Customer Maintenance

Last Modified on 06/20/2025 10:38 am 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).

Customer Maintenance	Delete Queteman	
Customer Maintenance	Delete Customer	
Change Customer	Delete Tank From Map	
Change Customer and Division	Delete Customer Owned Tanks	
Tanks Not Plotted	Delete Inactive Tanks From Map	
View Field Handhelds	CRM	

The initial Customer Maintenance view shows only active customers. Optionally check the box below the Customer list to *Include Inactive Customers*.

Div	Customer Number Name						
1	14232						
1	14233						
1	14234						
1	14235						
1	14236						
Include Inactive Customers							

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

Tank Info						
Credit Information						
Appliances						
Contract Gas						
History Inquiry						
Purged Inquiry						
Tank Readings						
Efficiency						
Payment Arrangement						
Tickler Information						
Meter/RTM Information						
Print Information						
Print Label						
Work Orders						
Energy-Image						

Press Tab to move through the different fields.

Add New Customer Account

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E Customer Numb	K K 🖗 n 2 ?	0 14 🖻 🕈 👂 🛈	Address	Phone
1 100007	100007 ADA	ANSEI	987 RONALD REGAN PARKWA	(317) 898.4455
1 100006	100006 ALL	SON SHANNON	123 PRODUCTION DRIVE	(800) 783-6560
1 100002	100002 BELL	EDNA	727 DAN JONES RD	(317) 654-6560
1 100005	100005 BRO	CK.MICHAEL	8877 SHORE LANE	(918) 257-6564
1 100000	100000 DOE	JANE	111 PRODUCTION DRIVE	(317) 999-9999
1 100004	100004 JONE	S,CURT	21 JUMP STREET	(317) 545-8897
ccounts Receivable A	ddress & Information Bud	get Information Land	lord Tank Rent	Tank Info
C	redit Limit	\$0.00 St	atus Active Date 0	0/00/00 Credit Information
Cum	ant Balance	\$275.00	Inactive Reason Code 0	Appliances
20.0	au Balance	00.033		Contract Gas
So Day Balance \$50.00			Turned Over To Collection No	History Inguiny
60 L	ay Balance	\$133.33	Number Of Tanks 1	T instory inquiry
90 C	ay Balance	\$0.00	Total Balance all Accts	Purged Inquiry
Tot	al Balance	\$458.33		Tank Readings
Call In History			Gallons Used YTD All Tanks	0.00 Efficiency
Last Pa	ument Date	11/30/13	Safety Info Received Date 00/00/00	Payment Arrangement
Last Paum	ant Amount	\$100.00		Tickler Information
Last Statem	ent Balance	\$188.33		Meter/RTM Information
Last Stat	ement Date	12/31/13		Print Information
A	ternate ID #			Print Label
	30 DAYS			Work Orders
Online Access	Tax Exemptions	User Defin	ed Tank Address Tank Pri	ces Energy-Image
Service Ord	ers	Proposals	Invoices	Service Locations

- 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.

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Div Customer Number	Bill To Name		Address		Phone	
1 100007	100007 ADAMS, ANSEL		987 RONALD RE	GAN PARKWAY	(317) 898-4455	
1 100006	100006 ALLISON, SHANN	ON	123 PRODUCTIO	(800) 783-6560		
1 100002	100002 BELL,EDNA		727 DAN JONES	(317) 654-6560		
1 100005	100005 BROCK, MICHAEL		8877 SHORE LA	(918) 257-6564		
1 100000	100000 DOE, JANE		111 PRODUCTIO	N DRIVE	(317) 999-9999	
1 100004	100004 JONES,CURT		21 JUMP STREE	т	(317) 545-8897	
ccounts Receivable Addre	ss & Information Budget Informatio	n Landlord Tar	ik Rent		Tank Info	
Credi	t Limit \$0.00	Status	Active	Date 00/00/00	Credit Information	
Current F	Salance \$275.00		Inactive Reason Code	00	Appliances	
30 Day 6	Ralance \$50.00			Contract Gas		
60 Day 6	Balance \$133.33		Turned Over To Collection	History Inquiry		
90 Day 8	Salance \$0.00		Number Of Tanks	Purged Inquiry		
Total B	alance \$458.33		Total Balance all Accts	\$458.33	Tank Readings	
Call In History			Gallons Used YTD All Tanks	0.00	Efficiency	
Last Payme	nt Date 11/30/13		Safety Info Received Date	00/00/00	Payment Arrangement	
Last Payment	Amount \$100.00				Tickler Information	
Last Statement E	Salance \$188.33				Meter/RTM Information	
Last Stateme	nt Date 12/31/13				Print Information	
Altern	ate ID #				Print Label	
34) DAYS				Work Orders	
Online Access	Tax Exemptions	ser Defined	Tank Address	Tank Prices	Energy-Image	
Service Orders	Proc	osals	Invoice	s	Service Locations	

- 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.
 - I. Go to the Accounts Receivable tab.

Div Cus	stomer Number	Bill To Name		Address		Phone	*
1	100007	100007 ADAMS, ANSEL	987 RONALD REGAN PARKWAY			(317) 898-4455	
1	100006	100006 ALLISON, SHANNON	V	123 PRODUCTIO	N DRIVE	(800) 783-6560	
1	100002	100002 BELL, EDNA		727 DAN JONES	RD	(317) 654-6560	
1	100005	100005 BROCK, MICHAEL		8877 SHORE LAI	NE	(918) 257-6564	
1	100000	100000 DOE, JANE		111 PRODUCTION	N DRIVE	(317) 999-9999	
1	100004	100004 JONES,CURT		21 JUMP STREE	Т	(317) 545-8897	-
counts R	Codit Limit	formation Budget Information	Landlord Tan Status	k Rent	Date 00/00/00	Tank Info	
	Credit Limit	30.00				Annliances	-
	Current Balance	\$275.00	Inactive Reason Code			Castrast Cas	
	30 Day Balance	\$50.00				Contract Gas	
	60 Day Balance	\$133.33		Turned Over To Collection N	History Inquiry		
	90 Day Balance	\$0.00		Number Of Tanks	Purged Inquiry		
	Total Balance	\$458.33		Total Balance all Accts	\$458.33	Tank Readings	
Call	In History			Gallons Used YTD All Tanks	0.00	Efficiency	
				Safety Info Received Date	00/00/00	Payment Arrangeme	int
	Last Payment Date	11/30/13				Tickler Information	
	Last Payment Amount	\$100.00				Tickier mormation	
	Last Statement Balance	\$188.33				Meter/RTM Informati	on
	Last Statement Date	12/31/13				Print Information	
	Alternate ID #	F				Print Label	
	30 DAYS					Work Orders	
Onlin	ne Access Ta	x Exemptions Use	er Defined	Tank Address	Tank Prices	Energy-Image	

- 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.

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Div Customer Number Bill To Name					Address			Phone		
1	100007	100007	ADAMS, AN	SEL		987 RONALD REGAN PARKWAY		(317) 898-4455		8-4455
1	100006	100006	ALLISON,S	HANNON		123 PRODUCTION DRIVE			(800) 783-6560	
1	100002	100002	BELL,EDN/	A		727 DAN JONES RD			(317) 654-6560	
1	100005	100005	BROCK,MICHAEL			8877 SHORE LANE		(918) 257-6564		
1 1000 🖉 Customer Information 🖾				111 PRODUCTION DRIVE			(311) 999-9999			
-	_	Appliance								
Accounts Re	eceivable	🕅 Budget		mation Lar	dlord Tank Rent				Tank II	nfo
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	_	Customer D	Select Ta	nks to Print						ation
	CL	Meter	Select	Tank's ID	Serial Number	r	Address		-	*5
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	60	Recurring B				BROWNSBUR	G IN	46112-		uiry
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	Last Statement	Balance								rmation
	Last Statem	nent Date								ation
	Alter	nate ID #								el
	1	30 DAYS								ers
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