

# Creating Ticklers

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Ticklers are notes that can be attached to a customer account and also tied to a specific tank. There are multiple Tickler types that can be tied to an account: *Collections, Driver, Memo, Repair, LPG Safety, and Service*. Once the Tickler has been created, it will remain on the customer account/tank unless removed. Tickler reports can also be printed per Division, date range, customer, or tank. This article discusses multiple ways to create Ticklers from different areas in Energy Force.

## From the Main Menu

1. Select **Tickler** from the Main Menu.
2. Enter the *Division*.

Div	Cust#	Tank Serial#	Loc	Type	Req. By	Due Date	Priority	Completed	Sticky Note?	Partial Msg
1	125	157766		Driver	7	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	switch to automatic
1	158			Driver	CS	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	STill @ 65%
1	163			Memo		00/00/00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	see cust memo
1	164			Memo		00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	She is going to drop budget to
1	164			Memo		00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	Wants to lower budget to 100.
1	216			Memo		00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	will call 6/11/18 pr Mike Fanu
1	257	652428		Driver	7	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	make will call..... 330 only
1	265			Memo		00/00/00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	124gal #VV040787 pkd up nev
1	270			Memo		00/00/00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	#785052 is lost or stolen 2020
1	310			Driver		00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	Do not leave bill anywhere exc
1	335			Memo		00/00/00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NO SALES TAX
1	409			Memo		00/00/00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ron will install 2nd reg on sa
1	428			Memo		00/00/00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NO SALES TAX
1	452			Memo	CS	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	
1	470	85606		Driver	5	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	House for sale
1	488	157761		Driver	6	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	Will/Call per John 55% 10/5/20
1	542			Memo	CS	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	change to auto fill again per

3. Enter the *Customer #* (press **F5** to go to list of customers).
4. Populate the *Date Entered* range.
5. Enter the *Tank Serial #* (press **F5** to go to list of serial number for that customer).
6. Select **Info** – An entry line will appear in the lower section of the screen displaying the customer account number and tank serial number (if attached). Select in the *Type* field and choose the Tickler Type.
7. Input date in the *Entered* field.
8. Additional information can be included such as *Req. By, Due Date,* and *Priority* level. The *Done* checkbox can be selected if instructional information in the tickler has been completed.
9. To display the message as a Sticky Note that displays prominently on *Customer Maintenance* screen, check the *Sticky Note?* option. Up to three Sticky Notes can be selected to display on the screen.



10. Enter the message pertaining to the customer/tank. Press **Ctrl+Q** to save.

Ticklers can also be created from anywhere in Energy Force by pressing **F8**. If not in the *Customer Menu* when pressing **F8**, the Division and customer account number will need to be selected.

## From the Customer Screen

1. From Main Menu, select **Customer Menu**.
2. Choose **Customer Maintenance**. If the customer already has a Tickler on file, the **Tickler** button will be in bold.
3. Select the desired customer and press **Ctrl+C** to create a Tickler.
4. Select the *Type* of Tickler from the drop down menu.

Division

Customer #

Date Entered  to

Tank Serial #

Collections  
Driver  
Memo  
Repair  
LPG Safety  
Service  
Payment

Show: **All**  
Not Completed  
Completed

Div	Cust#	Tank Serial#	Loc	Type	Req. By	Due Date	Priority	Completed	Sticky Note?	Partial Msg
1	125	157766		Driver	7	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	switch to automatic
1	158			Driver	CS	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	STill @ 65%
1	163			Memo		00/00/00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	see cust memo
1	164			Memo		00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	She is going to drop budget to
1	164			Memo		00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	Wants to lower budget to 100.
1	216			Memo		00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	will call 6/11/18 pr Mike Fanu
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1	470	85606		Driver	5	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	House for sale
1	488	157761		Driver	6	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	Will/Call per John 55% 10/5/2f
1	542			Memo	CS	00/00/00	0	<input type="checkbox"/>	<input type="checkbox"/>	change to auto fill again per

Name  Phone  Entered By ET 01/25/13 00:00:01

Message

Report  
 Excel

5. Enter initials of who this was requested by in the *Req. By* column.
6. Enter the *Due Date* and repair *Priority* if applicable.
7. To display the message as a Sticky Note that displays prominently on the *Customer Maintenance* screen, check the *Sticky Note?* box. Up to three Sticky Notes can be selected to display on the screen.



8. Select in the *Action Needed* area and enter the Tickler information.

9. Select **Tie to Tank** if applicable. A list of the customer tanks will appear. Highlight the tank and choose **Select**.

Div	Customer Number	Bill To Name	Address	Phone
1	100007	100007 ADAMS, ANSEL	987 RONALD REGAN PARKWAY	(317) 898-4455
1	100006	100006 ALLISON, SHANNON	123 PRODUCTION DRIVE	(800) 783-6560
1	100002	100002 BELL, EDNA	727 DAN JONES RD	(317) 654-6560
1	100005	100005 BROCK, MICHAEL	8877 SHORE LANE	(918) 257-6564
1	100000	100000 DOE, JANE	111 PRODUCTION DRIVE	(317) 999-9999

The detailed view below the table shows the 'Landlord Tank Rent' tab selected. It includes a 'Status' field with the same yellow sticky note, a 'Tank Info' sidebar with buttons for 'Credit Information', 'Appliances', 'Contract Gas', 'History Inquiry', 'Purged Inquiry', 'Tank Readings', 'Efficiency', 'Payment Arrangement', 'Tickler Information', 'Meter/RTM Information', 'Print Information', and 'Print Label'. The main area contains financial data:

Credit Limit	\$0.00
Current Balance	\$0.00
30 Day Balance	\$0.00
60 Day Balance	\$0.00
90 Day Balance	\$0.00
<b>Total Balance</b>	<b>\$0.00</b>

Below this is a 'Call In History' button and a table for payment and statement information:

Last Payment Date	00/00/00
Last Payment Amount	\$0.00
Last Statement Balance	\$0.00
Last Statement Date	00/00/00
Alternate ID #	