Creating Ticklers

Last Modified on 07/10/2025 5:37 pm EDT

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.

	Divisio	ABC PRO	PANE COMP	ANY									Collections]	
Cu	stomer	# 0											Memo Repair		
Date	Entere	d 00/00/00 to	07/10/25										LPGSafety	Show: All Not Complete	ed
Tanl	Serial	•											Payment	Completed	
Div	Cust#	Tank Serial#		Loc	Туре	Req. By	Due Date	Priority	Completed	Sticky Note?	Partial Msg				
1	26				Driver	1	00/00/00	0	•		helo				
1	10081				Memo		00/00/00	0							
1	10081	DB#1			LPGSafety	4	00/00/00	0			shannon				
1	10081	DB#1			Driver	2	00/00/00	0			shannon test				
1	10088	889JJ			LPGSafety	4	00/00/00	0			charbroil				
1	100000	9SF123456			Memo	SJF	11/09/21	0			ustomer called upset we dro	ve			
1	100000	9SF123456			Memo	SJF	00/00/00	0			COD ONLY. NEVER DELIV	EF			
1	100005	SPARE			Driver		00/00/00	0							
1	100005	SPARE			Memo	KBJ	00/00/00	0			Unable to make deliveries du	Je Ot			
1	100006	UNKNOWN			LPGSafety	4	00/00/00	0			Char-Broil				
1	100006	UNKNOWN			Memo	SJF	01/01/19	0			Fix the tires ruts made in	th			
1	100006	UNKNOWN			Driver	1234	00/00/00	0			this is a test of the import o				
1	100007	7899983			Driver	4	00/00/00	0			tank name and product is wr	ror			
Na	me .	Phone ().													08/17/18 08:58:00
Mess	ige hel	0												-	
	-												 Report 		
														OExcel	Create Save Print

- 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.

Di	vision 1 mer # 0	ABC PROPANE COMP	PANY			Colle Drive Men					Collections Driver Memo	ollections river ferno			
Data E	torod 00	(00/00 to 07/10/25										Repair LPGSafety	Show: 🖊	dl .	Exit
Date Li	itered 00	100/00 10 01/10/25										Service Payment	Not Completed		_
Tank Serial #															
Div Cu	st#	Tank Serial#	Loc	Туре	Req. By	Due Date	Priority	Completed	Sticky Note?	Partial Msg					
1 26				Driver	1	00/00/00	0			helo					
1 10	081			Memo		00/00/00	0								
1 10	081	DB#1		LPGSafety	4	00/00/00	0			shannon					
1 10	081	DB#1		Driver	2	00/00/00	0			shannon test					
1 10	880	889JJ		LPGSafety	4	00/00/00	0			charbroil					
1 10	0000	9SF123456		Memo	SJF	11/09/21	0			ustomer called upset we dro	ve				
1 10	0000	9SF123456		Memo	SJF	00/00/00	0			COD ONLY. NEVER DELIV	EF				
1 10	0005	SPARE		Driver		00/00/00	0								
1 10	0005	SPARE		Memo	KBJ	00/00/00	0			Unable to make deliveries du	10				
1 10	0006	UNKNOWN		LPGSafety	4	00/00/00	0			Char-Broil					
1 10	0006	UNKNOWN		Memo	SJF	01/01/19	0			Fix the tires ruts made in	th				
1 10	0006	UNKNOWN		Driver	1234	00/00/00	0			this is a test of the import o					
1 10	0007	7899983		Driver	4	00/00/00	0			tank name and product is wr	or				
Name		Phone ()												FT 08	8/17/18 08:58:00
Massage	holo									1 101	• <u>.)</u>		Cincrod Dy 1		30.30.00
wessage	neit												Report		
													OExcel	0	ireate Save Print

- 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 Alternate ID #	Name			Address
1 100007	ADAMS,ANSEL			123 PRODU
1 100006	ALLISON, JENNY			8855 SHOW
1 10088	BILLINGSLY,PETER			123 SOUTH
1 100005	BROCK, MICHAEL			123 ANYWH
1 10096	DEAN, TYSON			123 AIR PLA
2 444	DO,SHANNON			88 FREEW/
<				
Include Inactive Customers			3	
Accounts Receivable Address & Informat				
Credit Limit Current Balance 30 Day Balance	Needs regulator replaced by 08/01/2025!	Status	Active Inactive Reason Code	
60 Day Balance			Turned Over To Collection Number Of Tanks	No
90 Day Balance \$			Total Balance all Accts	
Total Balance \$			Sales YTD All Tanks	
		Ga	allons Used YTD All Tanks	
Last Payment Date	\$700.00		Safety Info Received Date	07/01
Last Statement Balance \$10	0,488.64			
Last Statement Date	07/31/18			
Bill To 100007				
	COD			