Creating Ticklers

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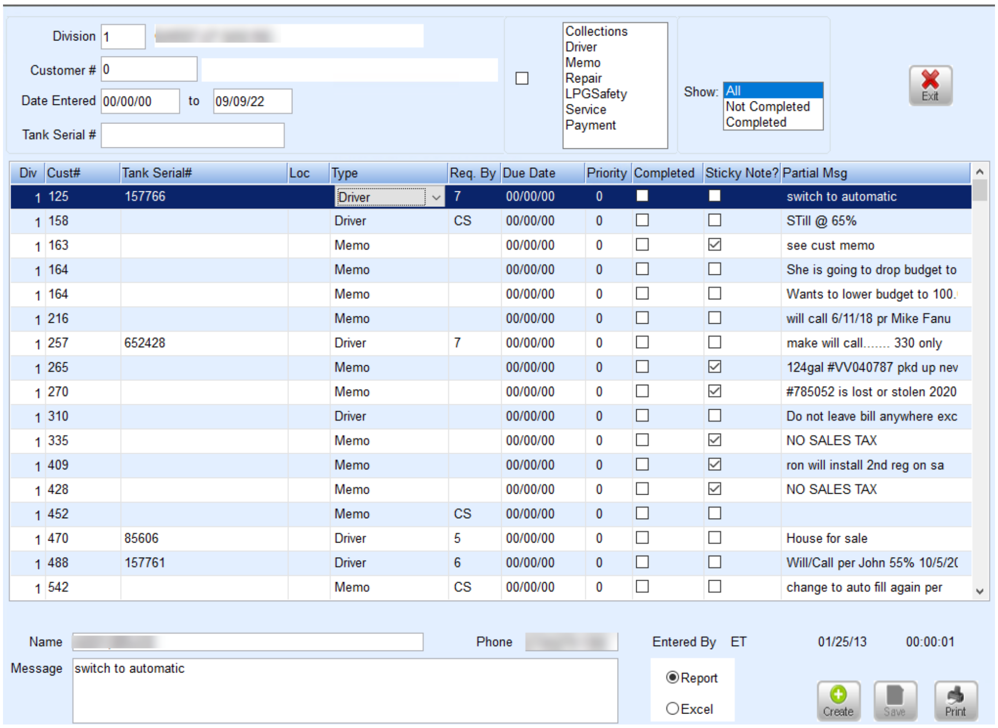
Ticklers are notes that can be attached to a customer account and also tied to a specific tank. There are multiple Tickler types that can be tied to an account: *Collections*, *Driver*, *Memo*, *Repair*, *LPG Safety*, and *Service*. Once the Tickler has been created, it will remain on the customer account/tank 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*.



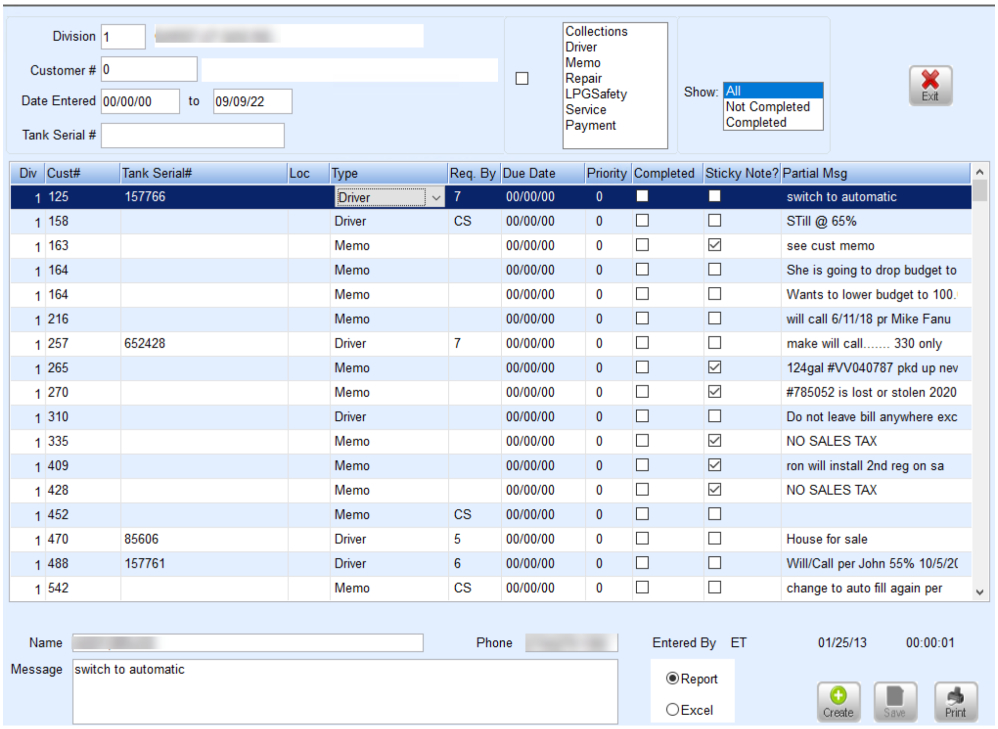
3. Enter the *Customer #* (press **F5** to go to list of customers).
4. Populate the *Date Entered* range.
5. Enter the *Tank Serial #* (press **F5** to go to list of serial number for that customer).
6. Select Info – An entry line will appear in the lower section of the screen displaying the customer 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.



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	☐	☐	switch to automatic
1	158			Driver	CS	00/00/00	0	☐	☐	STill @ 65%
1	163			Memo		00/00/00	0	☐	☑	see cust memo
1	164			Memo		00/00/00	0	☐	☐	She is going to drop budget to
1	164			Memo		00/00/00	0	☐	☐	Wants to lower budget to 100.
1	216			Memo		00/00/00	0	☐	☐	will call 6/11/18 pr Mike Fanu
1	257	652428		Driver	7	00/00/00	0	☐	☐	make will call....... 330 only
1	265			Memo		00/00/00	0	☐	☑	124gal #VV040787 pkd up nev
1	270			Memo		00/00/00	0	☐	☑	#785052 is lost or stolen 2020
1	310			Driver		00/00/00	0	☐	☐	Do not leave bill anywhere exc
1	335			Memo		00/00/00	0	☐	☑	NO SALES TAX
1	409			Memo		00/00/00	0	☐	☑	ron will install 2nd reg on sa
1	428			Memo		00/00/00	0	☐	☑	NO SALES TAX
1	452			Memo	CS	00/00/00	0	☐	☐	
1	470	85606		Driver	5	00/00/00	0	☐	☐	House for sale
1	488	157761		Driver	6	00/00/00	0	☐	☐	Will/Call per John 55% 10/5/2(
1	542			Memo	CS	00/00/00	0	☐	☐	change to auto fill again per

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**.