Customer / Tank Inquiry - Cylinder Exchange

Overview

This feature gives the ability to review information pertaining to a customer. Search by *Customer Name, Customer Number, Tank Serial Number* or *Address* by selecting **Unscheduled Delivery.**
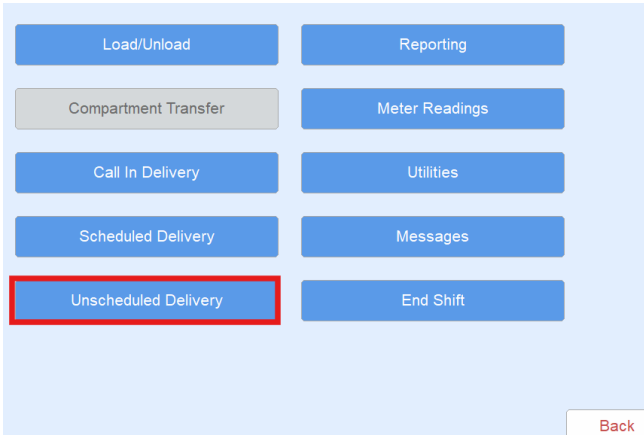
View tank information for the selected customer by tapping **Tanks**. The *Customer Tank* screen will display with each tank listed separately. View Tank Route, Contracts, Directions, and Call In/Hold information for this screen.
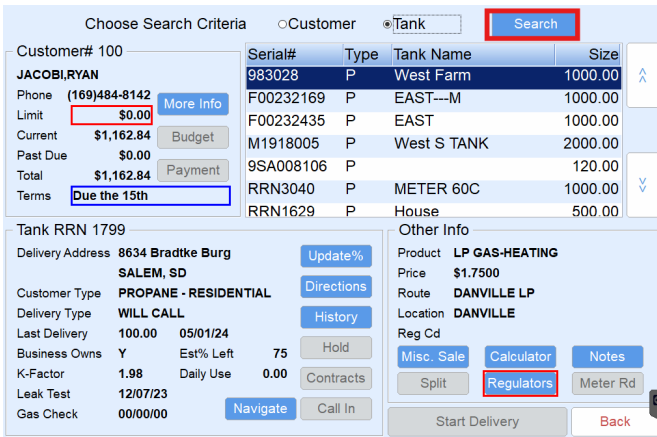
To view information specific to a tank, highlight the appropriate tank and see tank-specific information.

Choose Tank

Div	Serial#	Address
1	983028	8634 Bradtke Burg
1	F00232169	84000 Deckow Springs
1	F00232435	146 Neha Dam
1	M1918005	97060 Emmet Pines
1	9SA008106	384 Moore Haven
1	RRN3040	600 Mason Stream
1	RRN1629	2943 Madelynn Groves
1	RRN1630	94154 Adrienne Rapid
1	Q0007708	516 Lebsack Prairie
1	308159	0189 Gerlach Cape

Close   Select

Search by Customer Name

1. Select *Customer* for *Choose Search Criteria* then select **Search**.
2. Tap in the field directly under the *Name* column.
3. Begin typing the last name of the customer or the first name of a business. As the letters are entered, the program begins to auto-arrange and sort.
4. Select the customer name to display the corresponding information.
   - Customer Name and Customer Number
   - Phone and Work Phone numbers
   - Customer Credit Limits and Aging (useful when on-call for off hours)
   - Budget Payment information
   - Customer Credit Terms (useful when on-call for off hours and Call-In customer types)
   - Safety Information (Last Date safety information was sent)
   - More Info (shows Agvance prepay, budget and UAC balances.)
   - Last Payment date and amount

Directions

This tab shows driving *Directions* to the location as well as the delivery *Address* for the selected tank. It lists any special instructions associated with the selected tank. *Directions* and *Special Instructions* can be modified on the handheld.

Serial# Inquiry

Serial# Inquiry allows the driver to search for a customer account by either the tank serial number or address.

1. Select the *Tank* radial for *Choose Search Criteria* then select **Search**.
2. Select either the *Tank Serial Number* column or *Address* column to search if either is known and begin typing to filter the results.
    1. If only a partial street name or number is known, select the **carrot** next to the *Address* field header, then the *Custom Filter* option.
    2. Type in the partial known information and select **OK**. The results will display the addresses that contain the partial street name or number entered.
3. Once the serial number or address appears, choose **Select** to view more information about the tank or tanks at the address selected.