# Customer / Tank Inquiry - Cylinder Exchange

Last Modified on 06/09/2022 2:11 pm EDT

#### Overview

This feature gives the ability to review information pertaining to a customer like credit *Terms*, *Tanks*, *Budget* information, etc. This information is also available at the time of delivery and conveniently listed in tabs. Search by Customer Name or Customer#. To do this, tap in the field to search by and start typing the Customer Name or Customer#. Names are listed in EnergyTrack as Last Name, First Name.



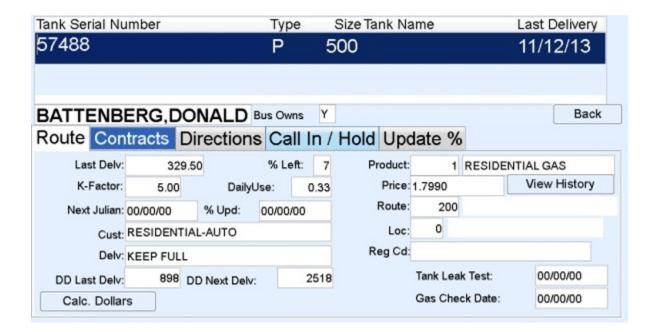
View tank information for the selected customer by tapping **Tanks**. The *Customer Tank* screen will display with each tank listed separately.



To view information specific to a tank, highlight the appropriate tank and see tank-specific information.

### Route

This tab shows pertinent route information such as, Customer Type, Delivery Type, Product, Price, etc.



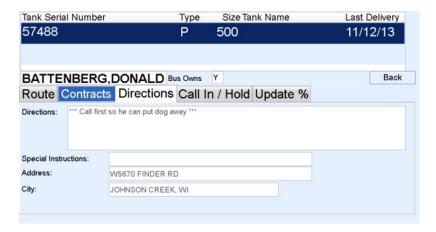
#### **Contracts**

This tab lists any contracts tied to the selected tank. It will show the date range for the contract along with remaining gallons and price per gallon on the contract. If there is an active contract attached to the selected tank, this tab will be highlighted in blue.



## **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.



## Call In / Hold

This tab shows if there is a Call In for the tank or if there is a Hold on the tank. If there is a Call In scheduled for this tank, the tab will be blue. If there is a hold on the tank, the tab will be red. By selecting the tab, information for the Call In or Hold will be provided. If the tank is on hold, the date it was put on hold and the reason for the Hold will display. If there is a Call In, who created the Call In, the date it was created, and if it has a minimum delivery will be displayed. It will also be indicated if it is an immediate fill and any comments entered for the Call In.

