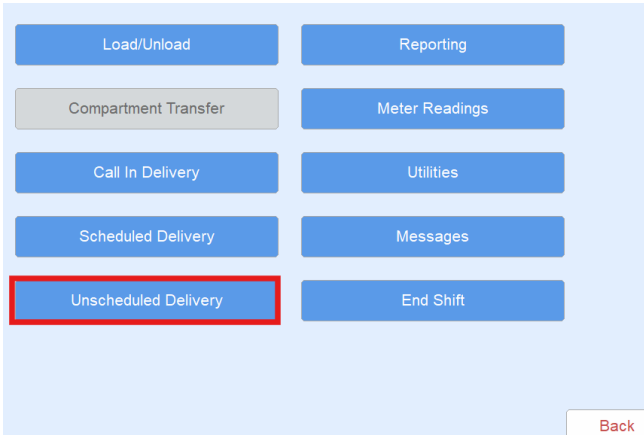


Customer / Tank Inquiry - Cylinder Exchange

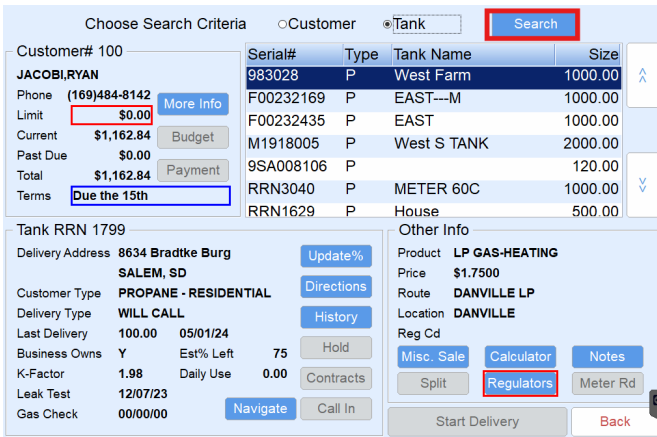
Last Modified on 03/04/2025 11:19 am EST

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.
 - o Customer Name and Customer Number
 - o Phone and Work Phone numbers
 - o Customer Credit Limits and Aging (useful when on-call for off hours)
 - o Budget Payment information
 - o Customer Credit Terms (useful when on-call for off hours and Call-In customer types)
 - o Safety Information (Last Date safety information was sent)
 - o More Info (shows Agvance prepay, budget and UAC balances.)
 - o 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.

Choose Search Criteria Customer Tank Search

Customer# 100280	Serial#	Type	Tank Name	Size
BERNHARD,NILS	2020202	C2		4.70
Phone (599)126-6713 More Info	RRN1649	P		500.00
Limit \$2,658.00 Budget				
Current \$0.00				
Past Due \$0.00 Payment				
Total \$0.00				
Terms CASH ONLY				

Tank RRN 3482

Delivery Address 1424 KENTUCKY AVENUE Update%	Product 20# CYLINDER EXCHANGE
WINDSOR, IL Directions	Price \$1,7900
Customer Type PROPANE - COMMERCIAL History	Route PLAINFIELD LP
Delivery Type WILL CALL	Location PLAINFIELD
Last Delivery 0.00 00/00/00 Hold	Reg Cd
Business Owns Y Est% Left 0 Contracts	Misc. Sale Calculator Notes
K-Factor 0.00 Daily Use 0.00 Split Regulators Meter Rd	
Leak Test 00/00/00 Navigate Call In	
Gas Check 00/00/00	Start Delivery Back

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.