

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.

Name	Customer#	Division#
BATTENBERG, DONALD	104950	1
BAUER, ALEX & CAROL	205476	1
BAUER, FRANK	205419	1
BAUER, FRANK	205542	1

Phone:	(920)699-2233	Budget Payment Amount:	0.00		
Work Phone:	() -	# Budget Pymnts:	0	# Times Billed:	0
Credit Limit:	\$0.00	Budget Begin:	00/0000	End:	00/0000
Current:	(1,905.26)	Terms:	GOOD CREDIT		
30 Day:	\$0.00	Safety Info Date:	10/01/90	Alt Credits	
60 Day:	\$0.00	Last Pay:	06/10/13	\$2,465.08	
90 Day:	\$0.00				
Total:	(1,905.26)	Tanks	Payment	Back	

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

Tank Serial Number	Type	Size	Tank Name	Last Delivery
57488	P	500		11/12/13

BATTENBERG, DONALD Bus Owns <input checked="" type="checkbox"/>		Back				
Route	Contracts	Directions	Call In / Hold	Update %		
Last Delv:	329.50	% Left:	7	Product:	1 RESIDENTIAL GAS	
K-Factor:	5.00	DailyUse:	0.33	Price:	1.7990	View History
Next Julian:	00/00/00	% Upd:	00/00/00	Route:	200	
Cust:	RESIDENTIAL-AUTO	Loc:	0	Reg Cd:		
Delv:	KEEP FULL	Tank Leak Test:	00/00/00	Gas Check Date:	00/00/00	
DD Last Delv:	898	DD Next Delv:	2518			
Calc. Dollars						

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.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
57488	P	500		11/12/13

BATTENBERG, DONALD Bus Owns Back

Route **Contracts** Directions Call In / Hold Update %

Last Delv:	329.50	% Left:	7	Product:	1 RESIDENTIAL GAS
K-Factor:	5.00	DailyUse:	0.33	Price:	1.7990 View History
Next Julian:	00/00/00	% Upd:	00/00/00	Route:	200
Cust:	RESIDENTIAL-AUTO				
Delv:	KEEP FULL				
DD Last Delv:	898	DD Next Delv:	2518	Tank Leak Test:	00/00/00
Calc. Dollars				Gas Check Date:	00/00/00

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.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
57488	P	500		11/12/13

BATTENBERG, DONALD Bus Owns Back

Route **Contracts** Directions Call In / Hold Update %

Dates	Number	Price	Gls Left	Bill Type
06/07/13 - 05/31/14	3245	1.6990	1,121.4	CONTRACTS

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.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
57488	P	500		11/12/13

BATTENBERG, DONALD Bus Owns Y Back

Route **Contracts** Directions Call In / Hold Update %

Directions: *** Call first so he can put dog away ***

Special Instructions:

Address: W5670 FINDER RD

City: JOHNSON CREEK, WI

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.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
57488	P	500		11/12/13

BATTENBERG, DONALD Bus Owns Y Back

Route **Contracts** Directions **Call In / Hold** Update %

Estimated Percent: Preset Gallons: Immediate Fill?

Comment:

Call In: Entered By:

Hold: