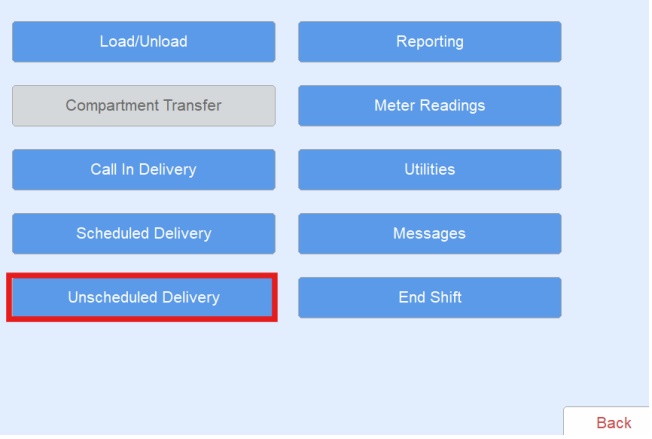
Customer / Tank Inquiry - Cylinder Exchange

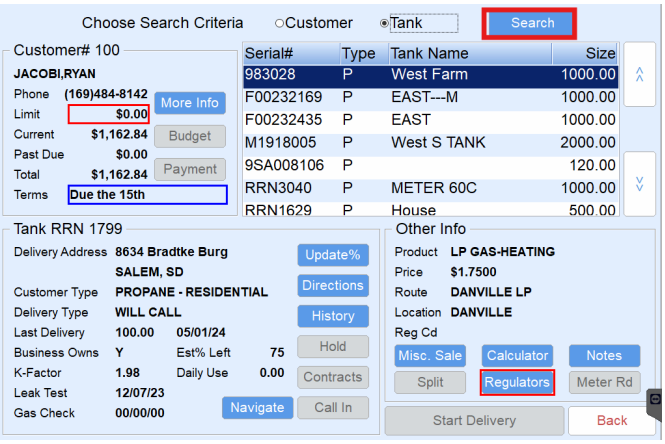
Last Modified on 05/30/2025 2:55 pm EDT

Overview

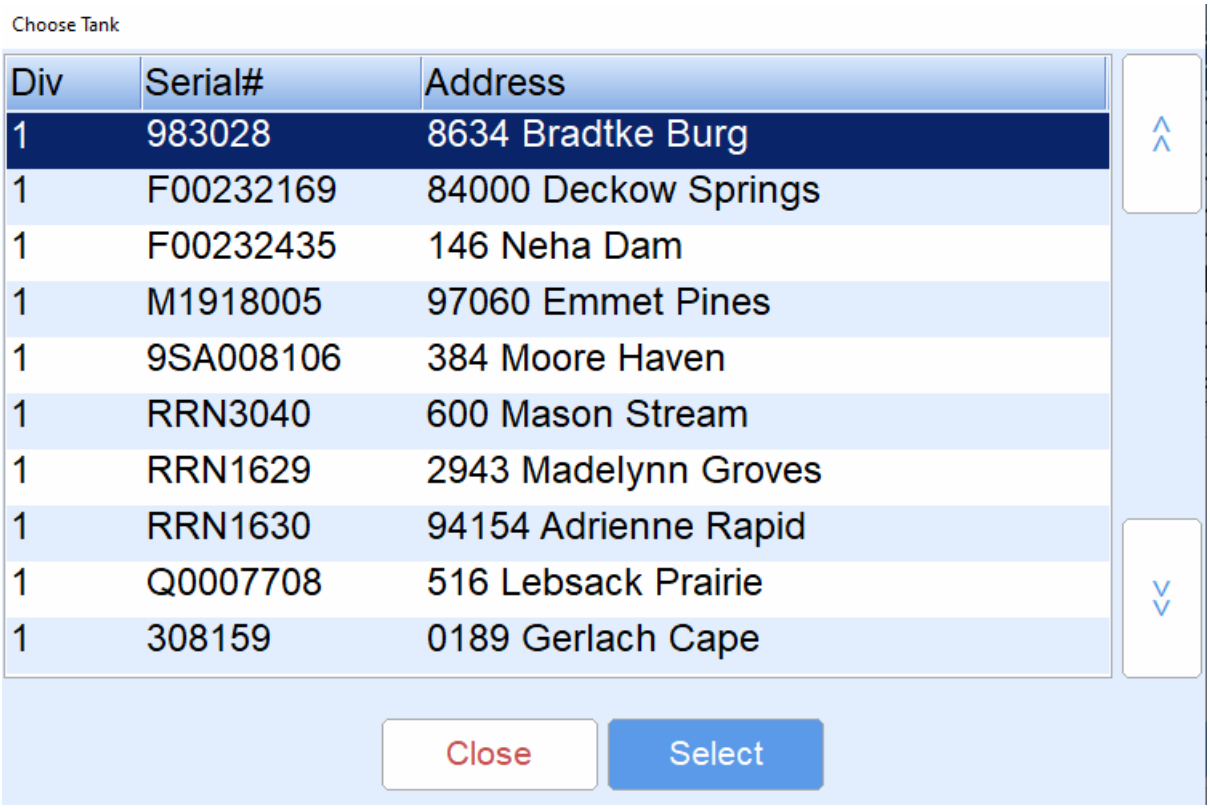
This feature gives the ability to review information pertaining to a customer. Search by *Customer Name*, *Customer Number*, *Tank Serial Number* or *Address* by selecting **Unscheduled Delivery.**



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.

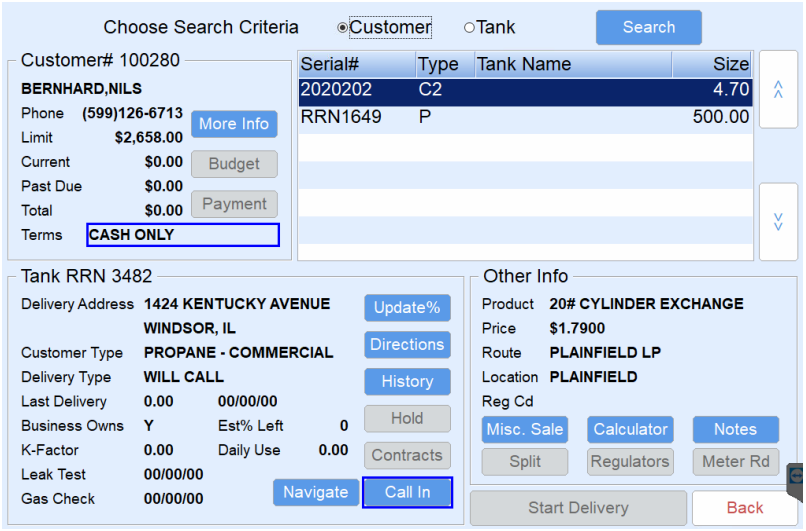


Search by Customer Name

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.

Past Due

A system setting is available for the Energy Track Past Due Alert placing a red outline around *Past Due* amounts on the *Customer/Tank* screen. The system setting will automatically generate and default to 30, but can be set to 30, 60 or 90 days. If the entry has anything other than 30, 60 or 90, the Past Due will display 30 days and older.

