# 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.

Chasse Cearsh Oritari	e Oueter		Tenk	-					
Choose Search Criteria Customer © lank Search									
Customer# 100	Serial#	Туре	Tank Name	Size					
JACOBI,RYAN	983028	Р	West Farm	1000.00 🔶					
Phone (169)484-8142 More Info	F00232169	Р	EASTM	1000.00					
Limit \$0.00	F00232435	Р	EAST	1000.00					
Current \$1,162.84 Budget	M1918005	Р	West S TANK	2000.00					
Past Due \$0.00	9SA008106	Р		120.00					
Iotal \$1,162.84	RRN3040	Р	METER 60C	1000.00 ¥					
Terms Due the 15th	RRN1629	Р	House	500.00					
Tank RRN 1799			Other Info						
Delivery Address 8634 Bradtke Burg Undate% Product LP GAS-HEATING									
SALEM, SD			Price \$1.7500						
Customer Type PROPANE - RESIDE		tions	Route DANVILLE LP						
Delivery Type WILL CALL	Hist	tory	Location DANVILLE						
Last Delivery 100.00 05/01/24		. I.al	Reg Cd						
Business Owns Y Est% Left	75	bid	Misc. Sale Calculate	or Notes					
K-Factor 1.98 Daily Use	0.00 Cont	racts	Split Regulator	Meter Rd					
Leak Test 12/07/23	Javigate Ca	l In							
Gas Check 00/00/00			Start Delivery	Back					

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	V
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.

Choose Search Criteria							
Customer# 100280 BERNHARD,NILS Phone (599)126-6713 Limit \$2,658.00 Current \$0.00 Budget	Serial# Type 2020202 C2 RRN1649 P	Tank Name	Size 4.70 500.00				
Past Due \$0.00 Total \$0.00 Payment Terms CASH ONLY			*				
Tank RRN 3482 Other Info   Delivery Address 1424 KENTUCKY AVENUE WINDSOR, IL Update%   Customer Type PROPANE - COMMERCIAL Directions   Delivery Type WILL CALL History   Last Delivery 0.00 00/00/00							
Business Owns     Y     Est% Left       K-Factor     0.00     Daily Use       Leak Test     00/00/00     Gas Check	0 Hold 0.00 Contracts Navigate Call In	Misc. Sale Calculator Split Regulators Start Delivery	Notes Meter Rd 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.

## 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.

Category		Setting Name	Actual Value
Energy Track		PastDueAlert	30
Pnone (374)331-4423 Limit \$1,000.00	More Info		
Current \$308.16	Budget		
Past Due \$307.94			
Total \$616.10	Payment		