

# Customer / Tank Inquiry - Propane

Last Modified on 12/18/2024 10:21 am EST

This feature enables the driver to review information pertaining to a customer such as *Credit Limits*, *Tanks*, *Budget* information, account balances, etc. Customers are listed by last name, first name, or by business name. Modifications with regard to customer tanks cannot be made within the *Inquiry* menu as all changes must be made within the *Unscheduled Delivery* menu.

## Search for Customer by Name

1. Tap in the field directly under the *Name* column.

The screenshot shows a mobile application interface for customer inquiry. At the top, there is a table with columns 'Name' and 'Customer# Division#'. The first row is highlighted in blue and contains 'LASTNAME, FIRSTNAME', '301112', and '1'. Below this table is a detailed form for the selected customer. The form includes fields for 'Phone:' (value: (555)555-5555), 'Work Phone:', 'Credit Limit:' (value: \$0.00), 'Current:', '30 Day:', '60 Day:', '90 Day:', and 'Total:' (all values: \$0.00). On the right side of the form, there are fields for 'Budget Payment Amount:' (value: 0.00), '# Budget Pymnts:' (value: 0), '# Times Billed:' (value: 0), 'Budget Begin:' (value: 00/0000), 'End:' (value: 00/0000), 'Terms:' (value: COD ONLY), 'Safety Info Date:' (value: 00/00/00), 'Last Pay:' (value: 00/00/00), and '\$0.00'. At the bottom of the form, there are three buttons: 'Tanks', 'Payment', and 'Back'.

2. Begin typing the last name of the customer or the first name of a business. As the letters are entered, the program begins to arrange and sort.
3. 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 Alt Credits (balance information for Agris interface users)
  - o Last Payment date and amount.

Select **Tanks** to review information regarding tanks for the highlighted customer.

## Route

This tab displays pertinent route information such as, *Cust. Type*, *Delv. Type*, *Product*, *Price*, etc.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
204349	P	500		06/08/16

LASTNAME, FIRSTNAME Bus Owns  Y Back

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

Last Delv:	0.00	% Left:	39	Product:	4 NEW CUSTOMER-RE
K-Factor:	2.43	Daily Use:	0.86	Price:	1.2990 <span style="float: right;">View History</span>
Next Julian:	00/00/00	% Upd:	06/30/16	Route:	200 BOB
Cust:	RESIDENTIAL-WILL CALL				
Delv:	WILL CALL				
DD Last Delv:	15	DD Next Delv:	634	Tank Leak Test:	00/00/00
Calc. Dollars	<b>Meters</b>			Gas Check Date:	06/08/16

If the customer has an active meter that has not received a meter reading, a red border will be around the **Meters** button. See Meter Readings for instructions.

See Calculate Dollars for instructions on using this button.

## Contracts

If the highlighted tank has an active contract, the *Contracts* tab will be highlighted in blue. This tab displays contracts associated with the selected tank, active *Dates*, *Price*, *Gls Left*, and *Bill Type* (pre-buy, cents down).

Tank Serial Number	Type	Size	Tank Name	Last Delivery
204349	P	500		06/08/16

LASTNAME, FIRSTNAME Bus Owns  Y Back

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

Dates	Number	Price	Gls Left	Bill Type
08/01/16 - 04/30/17	5125	1.0990	1,000.0	CONTRACTS

## Directions

This tab displays driving or delivery *Directions* for the delivery location as well as the delivery *Address*. The tab also displays *Special Instructions* associated with the selected tank. This tab will be highlighted in red if there are special instructions listed for the selected tank.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
204349	P	500		06/08/16

**LASTNAME, FIRSTNAME** Bus Owns  Y Back

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

Directions:

Special Instructions:

Address:

City:

## Call In/Hold

Information pertaining to Call In information will be listed on this tab with regard to *Estimated Percent* and *Comments*. If the tank is on Hold, a *Reason* code will display along with the date the tank was placed on hold.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
204349	P	500		06/08/16

**LASTNAME, FIRSTNAME** Bus Owns  Y Back

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

Estimated Percent:  Preset Gallons:  Immediate Fill?  N

Comment:

Call In:   Entered By:

Hold:

Tab colors will appear based on the following conditions:

- **Blue** – There is an active Call-In for the selected Tank.
- **Orange** – The *Preset Gallons* field will display in orange if the Call In is set for specific gallons.
- **Red** – There is an active Hold on this Tank.

## Update %

This tab is used to update the percentage of propane in the tank without making a delivery. It is unavailable on the *Customer/Tank Inquiry* screen. See *Update %* for more information.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
1122	P	500	HOUSE	03/22/18

**DO, SHANNON** Bus Owns  N

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

Current GPS Coordinates

Energy Map  Latitude  Longitude

Collect GPS  Latitude  Longitude

## Regulators

If currently attached to the selected tank and filled out properly, the tab will be highlighted in gray. If required information is missing such as manufacturers, stages, unknown manufacturers, and dates, the tab will be highlighted in red. See Regulators for details on how to set up and modify registers.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
204349	P	500		06/08/16

**LASTNAME, FIRSTNAME** Bus Owns  Y

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

Model	Manufacturer	Stage	Date Mfg	Bus. Owns	Comment
R2345	REGO	1ST STAGE	01/01/13	No	