

Customer / Tank Inquiry - Propane

Last Modified on 04/01/2025 2:59 pm EDT

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 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

Directions 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. Any changes made will be sent back to the office and available every time a driver makes a delivery.

Choose Search Criteria Customer Tank

Customer# 115380
BAILEY, ELYSE

Phone (697)167-0032

Limit \$0.00

Current \$23,060.98

Past Due \$0.00

Total \$23,060.98

Terms Due the 15th

Serial#	Type	Tank Name	Size
RRN264	DD		999.00
RRN265	DD		999.00
RRN266	G		999.00

Tank RRN 265

Delivery Address 46319 Loren Trail
SPRINGFIELD, SD

Customer Type DYED DIESEL

Delivery Type WILL CALL

Last Delivery 1,010.00 02/07/24

Business Owns N Est% Left 0

K-Factor 40.00 Daily Use 0.00

Leak Test 00/00/00

Gas Check 00/00/00

Other Info

Product **FIELDMASTER DIESEL**

Price \$3.1000

Route **ZIONSVILLE RF**

Location **ZIONSVILLE**

Reg Cd

Serial Number 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.

Leak Check

Leak Check dates can be updated within Energy Track without processing an Out of Gas. There is an **RET** option for this feature so it can be turned on or off. RET option 41, Allow driver to change leak check date is automatically generated when a download to RET, is generated or by accessing Re-Engineered Energy Track under the Energy Track at *Main Menu / Supervisor Menu / Maintenance Menu / Energy Track Menu / Re-Engineered Energy Track*. When the option is generated it is defaulted to N.

Seq#	Description	Value
36	Collect Regulator Information?	Y
37	Navigate	N
38	Display Acct. Balance	N
39	Energy Track V2	Y
40	Allow Payments	Y
41	Allow driver to change leak check date	N

In Energy Track, the *Leak Test* and *Gas Check* dates are displayed when clicking the **Leak Check** button in the lower left corner of the *Customer/Tank* information screen.

Delivery Type	WILL CALL		
Last Delivery	0.00	06/15/23	
Business Owns	N	Est% Left	80
K-Factor	0.00	Daily Use	0.00

When option 41 is set to Y, the driver can select **Modify** and the *Leak Test* date will populate with the current date and can be changed to a date within the last 7 days. No future dates are allowed. In order to save, the driver must check the box *I acknowledge date entered is correct* and select **Save**.

Leak Check

Check Dates

Leak Test

Gas Check **09/12/02**

I acknowledge date entered is correct

Leak Check

Check Dates

Leak Test

Gas Check **09/12/02**

I acknowledge date entered is correct

If **Cancel** is selected, the *Leak Test* date will revert back to the original value. This feature is only available when RET Option 39 is set to Y.