

Customer / Tank Inquiry - Refined Fuels

Last Modified on 12/18/2024 10:27 am EST

This feature enables the driver to review information pertaining to a customer such as credit terms, tanks, budget info, 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. All changes must be made within the *Unscheduled Delivery* menu.

Search by Customer Name

1. Tap in the field directly under the *Name* column.
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 auto-arrange and sort.
3. 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)
 - Alt Credits (balance information for Agris interface users)
 - 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, *Customer Type, Delivery Type, Product, Price*, etc. See [Calculate Dollars](#) for more information on this button.

Tank Serial Number	Type	Size	Tank Name	Last Delivery
BARN	DD	500	BARN	00/00/00
DYEDDSL	DD	500	FIELD	00/00/00

BROCK, MICHAEL	Bus Owns	N	Add Comment	Deliver	Back
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Route	Contracts	Directions	Call In/Hold	Update %
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Last Delv:	0.00	% Left:	0	Product:	3000	DYED DIESEL FUE
K-Factor:	0.00	DailyUse:	0.00	Price:	1.9900	View History
Next Julian:	00/00/00	% Upd:	00/00/00	Route:	1	ROB
Cust:	COMMERCIAL			Loc:	1	AVON
Delv:	WILL CALL			Reg Cd:		
DD Last Delv:	0	DD Next Delv:	0	Tank Leak Test:		00/00/00
Calc. Dollars	Prod. Deliv.	Meters	Navigate	Gas Check Date:		00/00/00

Contracts

If the highlighted tank has an active contract, the *Contract* 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
BARN	DD	500	BARN	00/00/00
DYEDDSL	DD	500	FIELD	00/00/00

BROCK, MICHAEL	Bus Owns	N	Add Comment	Deliver	Back
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Route	Contracts	Directions	Call In/Hold	Update %
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Dates	Number	Price	Gls Left	Bill Type
05/01/18 - 04/30/19	529	1.7500	10,000.0	.25 MAX PRICE

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
BARN	DD	500	BARN	00/00/00
DYEDDSL	DD	500	FIELD	00/00/00

BROCK, MICHAEL	Bus Owns	N	Back
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Route	Contracts	Directions	Call In/Hold	Update %
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Directions: TURN LEFT AT THE LIGHT AT JUNCTION 36 AND THEN FOLLOW THE SIGNS FOR HIS FARM.

Special Instructions: MEAN DOG

Address: 8877 SHORE LANE

City: PENSACOLA, FL

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
BARN	DD	500	BARN	00/00/00
DYEDDSL	DD	500	FIELD	00/00/00

BROCK, MICHAEL Bus Owns N Back

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

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 Number	Type	Size	Tank Name	Last Delivery
BARN	DD	500	BARN	00/00/00
DYEDDSL	DD	500	FIELD	00/00/00

BROCK, MICHAEL Bus Owns N Add Comment Deliver Back

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

Current GPS Coordinates Updating Tank %

Latitude Collect GPS Latitude

Longitude Longitude