

# Customer / Tank Inquiry - Refined Fuels

Last Modified on 02/06/2025 12:16 pm 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. 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)
  - More Info (shows Agvance prepay, budget and UAC balances.)
  - Last Payment date and amount

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

## 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# 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.

