

Customer / Tank Inquiry - Refined Fuels

Last Modified on 05/30/2025 2:55 pm EDT

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 Directions

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.

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

Phone (574)551-4423

Limit \$1,000.00

Current \$308.16

Past Due \$307.94

Total \$616.10

More Info

Budget

Payment