

Creating Ticklers

Last Modified on 07/10/2025 5:37 pm EDT

Ticklers are notes that can be attached to a customer account and also tied to a specific tank. There are multiple Tickler types that can be tied to an account: *Collections*, *Driver*, *Memo*, *Repair*, *LPG Safety*, and *Service*. Once the Tickler has been created, it will remain on the customer account/tank unless removed. Tickler reports can also be printed per Division, date range, customer, or tank. This article discusses multiple ways to create Ticklers from different areas in Energy Force.

From the Main Menu

1. Select **Tickler** from the Main Menu.
2. Enter the *Division*.

Div	Cust#	Tank Serial#	Loc	Type	Req. By	Due Date	Priority	Completed	Sticky Note?	Partial Msg
1	26			Driver	1	00/00/00	0	☐	☐	hello
1	10001			Memo		00/00/00	0	☐	☐	
1	10001	DBH1		LPGSafety	4	00/00/00	0	☐	☐	shannon
1	10001	DBH1		Driver	2	00/00/00	0	☐	☐	shannon test
1	10008	889J		LPGSafety	4	00/00/00	0	☐	☐	charbroil
1	100000	9SF123456		Memo	SJF	11/09/21	0	☒	☐	customer called upset we drove
1	100000	9SF123456		Memo	SJF	00/00/00	0	☐	☒	COD ONLY NEVER DELIVER
1	100005	SPARE		Driver		00/00/00	0	☒	☐	
1	100005	SPARE		Memo	KBJ	00/00/00	0	☐	☐	Unable to make deliveries due
1	100006	UNKNOWN		LPGSafety	4	00/00/00	0	☐	☐	Char-Broil
1	100006	UNKNOWN		Memo	SJF	01/01/19	0	☐	☐	Fix the tires ruts made in th
1	100006	UNKNOWN		Driver	1234	00/00/00	0	☐	☐	this is a test of the import o
1	100007	7899983		Driver	4	00/00/00	0	☐	☐	tank name and product is wor

3. Enter the *Customer #* (press **F5** to go to list of customers).
4. Populate the *Date Entered* range.
5. Enter the *Tank Serial #* (press **F5** to go to list of serial number for that customer).
6. Select **Info** – An entry line will appear in the lower section of the screen displaying the customer account number and tank serial number (if attached). Select in the *Type* field and choose the Tickler Type.
7. Input date in the *Entered* field.
8. Additional information can be included such as *Req. By*, *Due Date*, and *Priority* level. The *Done* checkbox can be selected if instructional information in the tickler has been completed.
9. To display the message as a Sticky Note that displays prominently on *Customer Maintenance* screen, check the *Sticky Note?* option. Up to three Sticky Notes can be selected to display on the screen.



8. Select in the *Action Needed* area and enter the Tickler information.

9. Select **Tie to Tank** if applicable. A list of the customer tanks will appear. Highlight the tank and choose **Select**.

Div	Customer Number/Alternate ID #	Name	Address
1	100007	ADAMS, ANSEL	123 PRODU
1	100006	ALLISON, JENNY	8855 SHOW
1	100088	BILLINGSLEY, PETER	123 SOUTH
1	100005	BROCK, MICHAEL	123 ANYWH
1	100096	DEAN, TYSON	123 AIR PL
2	444	DO, SHANNON	88 FREEW

☐ Include Inactive Customers

Accounts Receivable

Address & Informa

Credit Limit

Current Balance

30 Day Balance

60 Day Balance

90 Day Balance

Total Balance

Call In History

Last Payment Date

Last Payment Amount

Last Statement Balance

Last Statement Date

Bill To

Status

Active

Inactive Reason Code

Turned Over To Collection

Number Of Tanks

Total Balance all Accts

Sales YTD All Tanks

Gallons Used YTD All Tanks

Safety Info Received Date

Needs regulator replaced by 08/01/2025!

COD