Customer Service

Customer Search

Why it matters: Search is the starting point for most customer-service work and the required first check before onboarding a new customer.

Search Walkthrough

1. Open the main sidebar or navigation menu.
2. Select **Search**.
3. Enter the best customer information available.
4. Review the matching results instead of opening the first result automatically.
5. Confirm the customer or company name, account number, and service address.
6. If the account has multiple locations, choose the correct service location.
7. Open the correct account.

Ways to Search

- Customer name or company name
- Account number
- Phone number, including partial digits shown on caller ID
- Email address
- Service address
- Labels
- Partial customer information or broad terms, when supported by your company setup

How to Read the Results

A green match, or "likeness" figure, may appear below a result. It estimates how closely the result matches the information entered. It is not the customer's balance, status, or account score. Always verify the identifying details yourself.

- If the first search does not work, try another identifier or use fewer characters.
- Select **Show Inactive** before deciding that the customer is not in KozyOps.
- An inactive result may be a former customer whose history is still retained.
- A customer may be linked to several locations. Select the address connected to the current request.
- The address shown with a result may be a billing address instead of a service location.
- Use the recently viewed account shortcut to return to an account without repeating the search.

Customer Account Overview / Editing

Customer Account Overview

The customer account brings together contact, location, service, system, equipment, activity, and billing information. Not every employee will see or be permitted to change every item.

Main Information to Review

Account area	What to confirm
Identity	Customer or company name and account number
Contact	Phone numbers and email addresses, including who they belong to
Location	Service address, selected location, and location photo
Labels and status	Account labels, active/good-standing indicators, balances, and holds
Services	The active services connected to the customer or location
Systems and equipment	Fuel system, tank or other equipment, ownership, and related setup
Activity	Account notes and recorded events that help staff understand prior contact
Tabs	**Overview** plus other areas such as **Systems**, **Service**, **Communications**, and **Billing**, based on permissions and company setup

Confirm the Correct Customer

- Review the customer or company name.
- Check the account number.
- Confirm the service address.
- If multiple locations are available, select the correct location.
- Confirm the contact information before making changes or creating work.

Add or Update a Location Photo

- Open the image or photo area on the account.
- Select **Upload Images**.
- Choose an appropriate photo of the property or building.
- Enter a simple image name or caption.
- Upload the image.
- Set the image as the default when appropriate.
- Return to the account overview and confirm that the photo belongs to the selected location.

A clear location photo helps drivers and technicians identify the correct property and reduces the risk of going to the wrong site.

Update Contact Information

- Select the phone number or email area on the account.
- Add a new entry or edit the existing information.
- Identify the person connected to the phone number or email when applicable.
- Associate the information with the correct location when the screen asks for it.
- Save the change.
- Confirm the updated information appears on the account.
- Mark the primary email as the default for email communications, so invoices, payment receipts, and budget, quote, and fuel-contract messages reach the customer.

Account and Location Settings

Use the gear icon beside the relevant customer or location area to review settings such as customer or location information, labels, tax status, promotions, notes, or addresses. The exact choices depend on permissions and company configuration.

Want me to go back and apply this same numbers-to-bullets, no-letters change to the Logging In and Customer Search articles too, so all three stay consistent?

Customer Account Onboarding

Customer Onboarding Walkthrough

Customer onboarding creates the customer record and connects it to the right service location, relationship, fuel system, equipment, and services. The demonstration values used during training were examples only. Use your company's approved settings for live customers.

Step 1 — Search Before Creating

- Open **Search**.
- Search using the customer's name or company, service address, phone number, email, and other available information.
- Select **Show Inactive**.
- Check for an existing customer record.
- Check whether the service location already exists.
- Begin onboarding only after confirming that a new customer record is needed.

Existing address: An existing address may belong to a prior customer or another person connected to the property. It does not automatically mean the current caller already has an account, but it must be reviewed before continuing.

Step 2 — Create the Initial Customer Record

- From **Search**, select **Onboard Customer**.
- Select the applicable brand when the screen requires it.
- Enter the customer's name or the company name.
- Add the available phone number and email address.
- Enter or search for the billing address.
- Select how the customer wants to receive invoices, such as email or mail.
- Review service-plan renewal and marketing opt-out preferences when applicable.
- Create the customer record and continue.

Step 3 — Add the Service Location

- Enter or search for the service address.
- Review any notice that the location already exists.
- Confirm that the map shows the correct property.
- Move the map marker if it is not placed correctly.

- Continue only after verifying the service location.

The billing address and service location may be different. Confirm both before moving forward.

Step 4 — Choose the Customer Relationship

Relationship	Meaning shown in training
Primary	The main owner or responsible customer connected to the location.
Tenant	The renter or occupant. The training example showed fuel billed to the tenant while certain service responsibility remained with the owner.
Price Match	Links the customer or location to pricing from another applicable location.
Fuel Payment Override	Links another party that is responsible for fuel charges at the location.

Select the relationship that matches the customer's real responsibility. Fuel, service, and payment responsibility can differ.

Step 5 — Add Location Details

- Add useful labels that match your company's approved setup.
- Select applicable location attributes or details.
- Review the correct taxes or tax-exempt status.
- Add an approved promotion or incentive only when authorized.

Labels help staff organize and find accounts. Demonstration labels, taxes, and promotions were training examples, not required defaults.

Step 6 — Add the Fuel System

The fuel system records how the location uses fuel and how deliveries should be planned. Complete only the fields that apply to the customer and your company's process.

Field	What it is for
System name/type	Use a clear name and choose the correct system category.
Active / Auto Delivery	Mark the current system active and select automatic delivery only when appropriate.
Fuel and usage	Choose the correct fuel and its uses, such as heat, cooking, generator, or pool.

Delivery planning	Use the approved method: degree-day forecasting, a linked tank monitor, or a recurring calendar schedule.
Fill location	Describe where the fill connection or tank is located.
Driver alert	Record an instruction the driver should see before arrival, such as a gate, pet, or driveway concern.

Training values are examples: Do not copy the demonstrated fuel, tank size, degree-day values, delivery schedule, notes, or incentive into a live account unless those values are correct for that customer and approved by your company.

Step 7 — Add Equipment

- Select the equipment type.
- Connect the equipment to the correct system.
- Identify whether the equipment is customer-owned or company-owned/rented, as applicable.
- Enter the equipment size or choose an available size option.
- Enter the serial number and inspection information when available.
- Add relevant attributes, such as above-ground or below-ground placement.
- Save the equipment and confirm it appears under the correct system.

Some equipment details may be completed later, after a technician inspects the property.

Step 8 — Add Services

- Select the appropriate service, such as the applicable fuel-delivery service.
- Enter the service start date.
- Identify the applicable employee or salesperson when required.
- Enter the lead source when your company tracks it.
- Record the signed-terms date when applicable.
- Add an approved incentive when applicable.
- Save the service and confirm that it is active.

A customer must have at least one active service to appear as **Active** in Search. Add and activate the required service before finishing.

Step 9 — Holds and Payment Information

- Add a hold only for an approved reason, such as waiting for signed terms, required installation work, or a payment-related issue.
- Add payment information during onboarding only when appropriate and authorized.
- Use the copy-address option when the billing address matches the customer information shown.

- Review which categories the card should use for autopay. Autopay choices apply to that payment method.
- Follow company procedures for card entry, authorization, and payment handling.

Step 10 — Complete and Verify

- Customer or company name and contact information are correct.
- Billing address and service address are correct.
- The correct location and relationship are selected.
- Labels, taxes, promotions, and holds were reviewed, not copied from the demo.
- The correct fuel system and delivery-planning method are recorded.
- Equipment is connected to the correct system and ownership is correct.
- Required services are active.
- Fill information, driver alerts, router notes, and system notes are in the intended fields.
- Payment and autopay settings were reviewed when payment information was added.
- The completed customer account opens correctly and shows the expected information.

Creating an Annual Tune Up

Creating an Annual Tune-Up

- Go to the customer's account and click **Systems**.
- Find the relevant fuel system (Propane, Oil, or HVAC) and click the **gear icon** on that system.
- Click ☀ **Schedule Heat Tune-Up**.
- Select the equipment (for example, a boiler).
- Select the **service date**.
- Select the **arrival window**.
- Add visit notes, if applicable.
- To confirm the ticket was created, go to the **Service** tab and check for the new entry.

Making a Delivery Request

Making a Delivery Request

- Go to the customer's account and navigate to the **Systems** tab.
- Confirm that both the boiler and the tank are listed under the system.
- Scroll to **Deliveries** at the bottom and click **Delivery Request**.
- Add a message describing the situation, for example: "*Customer called saying they are at ¼ tank and want a delivery tomorrow.*"
- Enter the requested volume.
- Select a delivery window.
- Note the **Preauthorize Amount** and **Charge Immediately** features.
  - **Preauthorize Amount**
    This holds a set dollar amount on the customer's card before the delivery happens, rather than charging it immediately. It's typically used to confirm the customer has valid, sufficient payment on file. Once the actual delivery total is known, the final charge is submitted and the hold is released or adjusted to match.
  - **Charge Immediately**
    This charges the customer's card at the time the delivery request is created or confirmed, rather than waiting until after delivery. It's typically used when a company wants payment secured up front rather than billed afterward.
- Quote the customer a price based on current rates.

Creating a Service Ticket

Creating a New Service Ticket

- Go to the customer's account.
- Click **Concerns +**, enter a description of the issue (for example, "Water Leak"), and save.
- Click **Projects +** and select the concern you just created.
- In the ticket, click **Visits** and open the visit by its ticket number.
- Click **+** and add the relevant equipment or job types (for example, a boiler or expansion tank).
- In the Visit tab, set the service date.
- Add the assigned technician.
- Enter the job order.
- Select the arrival window.
- Add any needed parts to the visit.
- Under **Activity** in the top right, click **+** to see the available note types. Use **Project Note** when the note should be visible to technicians, and enter details relevant to the visit.
- Add a separate activity under **Dispatch** for details the dispatcher needs to see, such as when the customer will be home.
- Open the service board to confirm the ticket now appears there.

Creating a New Visit in the Same Project

Use this when going out again for the same issue.

- Go to the customer's account.
- Click **Projects** and select the applicable project (for example, a water leak). If you don't see your project, toggle **All Projects**.
- In the ticket, click **New Visit**.
- Click the ticket number to open the service ticket.
- Set up the ticket as needed.