Customer Service

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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 before updating an account, taking a payment, creating service work, or entering a request.

Search Walkthrough

1. Open the main sidebar or navigation menu.
2. Select **Search**.
3. Enter the best customer information available, such as the service address, account number, phone number, customer name, company name, or email.
4. Refine the search with a different identifier, and turn on **Show Inactive** when the customer may be inactive.
5. Review the matching results instead of opening the first result automatically. Business accounts show the company name first, with the contact's name beneath it.
6. Confirm the customer or company name, account number, and service address.
7. If the account has multiple locations, expand it and choose the correct service location.
8. Open the correct account before making changes.

Ways to Search

- Customer name or company name
- Contact person's name on a business account
- 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.

> **Reminder:** Always search before onboarding a customer. The same address may appear more than once because of a Primary/Tenant relationship or a different Address Line 2.

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

Review the Customer Header

The customer header shows the account number with the payment terms, brand, relationship, email and mail preferences, contact details, and a count when the customer has more than one location. Service plans, fuel services, budget plans, taxes, promotions, and autopay are listed on the right, and labels appear along the bottom.

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

- Use the add action beside **Phone** or **Email**, or edit the existing entry.
- Enter the contact information and identify the person's name or role in the description.
- Associate the information with the correct location when the screen asks for it.
- Set the default contact when appropriate.
- Flag every email address that should receive mail. Receipts, statements, and invoices go to every flagged address.
- Save the change and confirm the updated information appears on the account.

Saved phone numbers and email addresses can also be used to find the account in Search.

Account and Location Settings

Select the gear to the left of **Overview** to review and update settings such as payment terms, customer or billing information, location information, labels, tax status, promotions, notes, addresses, and preferences. Update only the information that changed. The exact choices depend on permissions and company configuration.

Internal Notes and Operational Notes

- For a private internal note, open **Events** or **Activity**, choose the appropriate event type, enter a concise factual note, and save it.
- For information needed by field or routing staff, open the applicable system settings and use **Driver Alert**, **Router Notes**, or **System Notes**. Keep private internal remarks out of operational notes.

> **Know the difference:** The billing address belongs to the customer and is used for billing. The service location is the physical address where fuel is delivered or service is performed. Operational notes may appear in driver, router, ticket, or other customer-facing workflows; use Events or Activity for private internal notes.

What Else You Will See

- **Fuel services:** an icon beside each fuel service shows will-call (a phone) or automatic delivery (a sync arrow).
- **Overdue amount:** the customer dashboard leads with the overdue amount, then the current balance.
- **Blocked email:** a red warning triangle beside Email means an address bounced or reported spam. In the contact list, that address shows a red **Blocked** tag with the reason and date. After the customer confirms the address is good, select the check icon on that row to clear the block. Retyping a corrected address clears it automatically.
- **Activity feed:** invoices, payments, and deliveries appear in the timeline beside notes. Choose which record types to show.
- **Change history:** a system's audit shows who changed what and when, with before and after values. Viewing it takes its own permission.

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. For a business, enter the company name and a named contact person.
- Add the available phone number and email address.
- Enter or search for the billing address.
- Review the payment terms shown, which default to the account's default term.

- Select how the customer wants to receive invoices, such as email or mail. Set service-plan auto-renew and automatic-payment preferences only when they apply and are authorized.
- Create the customer record and continue.

Step 3: Add the Service Location

- Enter or search for the service address. Use the billing address only when it is also 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.
Service Payment Override	Links another party that is responsible for unpaid service 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. A new system starts on the fuel's default winter and summer rates.
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 with the customer's actual winter and summer usage values, a linked tank monitor when one is installed, or a recurring calendar schedule.
Fill location	Click the spot on the house plan where the fill is; the street side is the front. Use the fill note for anything the picture cannot show.
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. A start date is required and defaults to today.
- 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 the customer authorizes it. Payment information may also be added later through the Customer Portal when available.
- 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

Select **Complete Onboarding**, then review the new account:

- 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.

> **Warning:** Complete fields marked as required. Fuel type and tank size are required for delivery setup. Equipment ownership can affect responsibility, service, and billing. Use the customer's actual delivery settings and usage values rather than training examples.

Step 11: Invite the Customer to the Customer Portal

If the customer will use the Customer Portal, find the **Portal Invitation** panel on the customer record, confirm the email address with the customer, and select **Invite to Portal**. See Inviting a Customer to the Customer Portal.

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. The Service tab shows each project as one timeline, from the first concern to the final invoice.

> **Reminder:** A tune-up must be connected to the correct system, service location, and eligible equipment. Keep the visit labeled **Tune-Up**; a unit's last tune-up date updates only from visits with that label.

Finding Customers Due for a Tune-Up

- Open the **Tune Up Search** report. It tracks tune-up status for each piece of equipment.
- Filter by Status, Coverage, Type, and Refine, then use **Mark as Called**, **Email Customer**, or **Schedule** on each row.
- A service plan counts as tune-up coverage when its template includes a tune-up.
- Customers can also request a tune-up from the Customer Portal calendar.

Making a Delivery Request

Making a Delivery Request

Use a delivery request to record a customer's will-call, emergency, or specific-volume fuel request so dispatch can review it for routing.

- 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. If Degree Day values are missing, enter the customer's actual winter and summer values.
- Scroll to **Deliveries** at the bottom and click **Delivery Request**. You can also select **Schedule delivery** from the **Tank now** card on the Delivery History page.
- 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. Tap one of the preset windows when your company has set them up. If the company has locked the window, the date picker is disabled and explains why. Days on the company holiday calendar are skipped.
- Note the **Preauthorize Amount** and **Charge Immediately** features. Use either option only when it applies, a valid card is available, and the customer has authorized it.
  - **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, then submit the request. The quote includes only the taxes the invoice will charge.

> **What happens next:** Submitting a request does not route, schedule, or assign the delivery. Dispatch must still add it to routing or staging and assign the load, route, truck, and driver. The request shows who created it: your name, a portal request by the customer, or the system schedule.

If the customer is on a credit hold, a warning appears when you create the delivery. Follow company policy before continuing.

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.

Recording a Tank Level Adjustment

Use a Tank Level Adjustment when a customer reports what is in the tank, or when another supplier or the customer put fuel in it. It keeps the delivery forecast accurate. Nothing is billed and nothing leaves inventory.

Steps

1. Search for and open the correct customer and service location.
2. Open **Systems**, or the system's Delivery History page, and select **Record tank level** or the Tank Level Adjustment action.
3. Pick the day the tank was checked or filled. A future date is not allowed.
4. Set the level by dragging the gauge or typing the reading, in gallons or percent. A dashed marker shows the level the system projected for today.
5. If someone else delivered fuel, turn on **Someone else delivered fuel** and enter the gallons, if known.
6. Review the summary, then save. The row shows a blue **External adjustment** tag in the Systems tab and Delivery History.

> **Note:** Metered and fleet systems cannot take an adjustment, and a level above the usable tank size cannot be saved. When a tank monitor is installed and reporting, its reading takes priority over the entered level.

Inviting a Customer to the Customer Portal

Use a portal invitation so an existing customer can sign in to view invoices, statements, and plans, make payments, and request deliveries or tune-ups.

Steps

1. Search for and open the correct customer account.
2. Find the **Portal Invitation** panel on the customer record. It shows the email the invitation will go to and whether the customer has been invited or already has an account.
3. Confirm the email address with the customer.
4. Select **Invite to Portal**. Use **Resend invitation** if the customer cannot find the email.

> **Inviting many customers:** Use **Reports > Portal**, select the eligible customers, and send the invitations in one pass. Each row shows its own result. This requires the portal-management permission. If a customer cannot be invited, the panel says why.

Common Portal Questions

- Customers can log in regardless of how their email was capitalized.
- A wrong password shows "Invalid email or password." Customers can reset it from the login page.
- Paying the full balance in the portal takes any prompt-pay discount still inside its deadline.
- Customers can sign budget, fuel contract, and agreement proposals in the portal. Attaching an autopay card when signing is optional.

For what customers see once they sign in, see Customer Portal.

Text Message Notifications

Use this page to answer customer questions about delivery texts from your company.

- Customers turn on text messages in the Customer Portal and confirm the phone number with a six-digit code.
- Texts come from your company's own number. A customer's reply appears in the same conversation thread the office uses.
- A customer may receive a text when the delivery is routed and when the driver is on the way.
- A customer who turns off texts in the portal is not texted. Staff can also opt a customer out of delivery texts individually.

Deactivating a Customer Account

Use this workflow when a customer cancels with your company or moves out, so no new deliveries, service work, or recurring billing are created for the account.

Before You Deactivate

- Review the account balance and any open invoices, and follow company policy for collecting or crediting them.
- Check for scheduled or requested deliveries and service visits that should be cancelled.
- Review autopay, budget plans, service plans, and other subscriptions in Billing.

Deactivate an Account

1. Search for and open the correct customer account and service location.
2. Find the customer's active services on the account.
3. Cancel each active service so it is no longer active.
4. Refresh the account and confirm no active services remain.

> **Note:** A canceled or departed customer's service plans and subscriptions stop renewing. A service plan tied to a location the customer no longer occupies is cancelled automatically. To find the account later, turn on **Show Inactive** in Search.

Tenant Moved Out

When a tenant moves out, keep the service location with the primary customer, usually the owner, and remove it from the tenant's account.

1. Search for and open the tenant's customer account.
2. Select the gear to the left of **Overview**, then select **Location**.
3. Edit the attached location so it stays connected to the primary customer.
4. Save the change.
5. Cancel the tenant's active services, as described above.
6. Open the primary customer's account and confirm the service location and its systems are still attached.

> **Warning:** Deactivate only the account that is leaving. Before cancelling services, confirm the customer, the service location, and the relationship, so the primary customer's deliveries and service are not affected.

Creating a Propane Cylinder Exchange Request

Use this workflow to record a one-time cylinder pickup and drop-off request for an existing exchange customer and location.

Steps

1. Search for and open the correct customer and service location.
2. Open **Exchange** and select the correct active drop-off point.
3. Select **New Request**.
4. Select the cylinder type.
5. Enter the number of cylinders to drop off and the number to pick up.
6. Enter a price override only when it applies and you are authorized to use it.
7. Add one-time instructions when needed, then select the date the customer needs the exchange.
8. Create the request.

> **What happens next:** The request is sent to the routing workflow but is not yet assigned. Put permanent access or delivery instructions in the saved operational notes or drop-off-point record; use request instructions only for that one exchange.

Exchange Notes

- When adding a drop-off point, use the address search to place the map pin. Latitude and longitude can also be edited by hand.
- Rental agreements require a drop-off point, which is selected automatically when the customer has only one.
- A recurring drop-off-point schedule creates its requests as soon as it is saved, and every 2, 3, or 4 week schedule follows its own cadence.
- Drivers can have the customer sign a delivery slip at the stop and email the slip to the customer.
- Cylinder rentals bill once a month for the month that just closed, based on the cylinders checked in on site.