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.

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