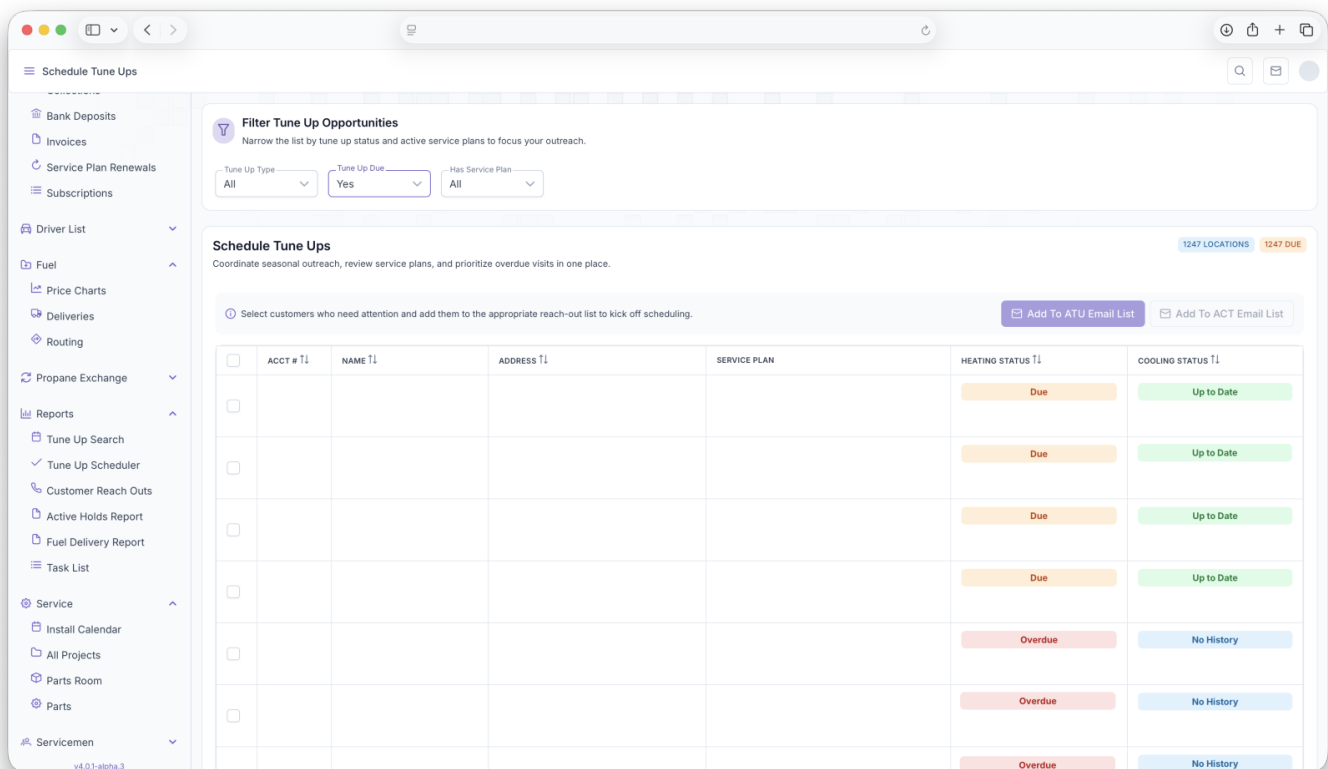


Tune Up Search

Tune Up Search

Tune Up Search can be used to see all Tune-up opportunities in order to review and coordinate any upcoming visits and schedule appropriate outreach opportunities. The Tune Up Search page can be pulled up by clicking on the Reports dropdown on the side menu then clicking on Tune Up Search. Clicking on the three bars on the top left corner of the page will expand the side menu to show more detail allowing for easier navigation. The page can then be filtered by Tune Up Type, Tune Up Date and if the Customer Has a Service Plan. The report will then pull up with the following columns



The screenshot shows a web application interface for 'Schedule Tune Ups'. On the left is a sidebar menu with categories like Bank Deposits, Invoices, Service Plan Renewals, Subscriptions, Driver List, Fuel, Price Charts, Deliveries, Routing, Propane Exchange, Reports (including Tune Up Search), Service, and Servicemen. The main area has a 'Filter Tune Up Opportunities' section with dropdowns for 'Tune Up Type' (All), 'Tune Up Due' (Yes), and 'Has Service Plan' (All). Below this is a 'Schedule Tune Ups' section with a table of customer data. The table has columns for selection, account number, name, address, service plan, heating status, and cooling status. The heating status is color-coded: orange for 'Due' and red for 'Overdue'. The cooling status is color-coded: green for 'Up to Date' and blue for 'No History'. There are buttons to 'Add To ATU Email List' and 'Add To ACT Email List'.

	ACCT # T1	NAME T1	ADDRESS T1	SERVICE PLAN	HEATING STATUS T1	COOLING STATUS T1
☐					Due	Up to Date
☐					Due	Up to Date
☐					Due	Up to Date
☐					Due	Up to Date
☐					Overdue	No History
☐					Overdue	No History
☐					Overdue	No History

- Account Number - Customer account number
- Customer Name - Name of The Customer
- Customer Address - Customer address
- Service Plan - If the Customer has a Service plan, it will appear here
- Heating/Cooling Status - Shows the status of the customers current heating and/or cooling system, which includes **No History**, **Up to Date**, **Due**, **Overdue**, the last time the system was serviced and the last reach out that was made for the system

All Rows can then be selected individually or all at once if they need to be added to the ATU Email List or the ACT Email List. This can be done by clicking on the Add To ATU Email List or Add To ACT

Email List buttons after seleceting which customers get added to what list.

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