Generate Orders

The Generate Orders screen will allow you to track consumption site that needs a delivery and will allow you to create a Call Entry and Dispatch them automatically for multiple customer sites. The record on the grid can be filtered using the filters on the Selection Criteria panel.

Button and Section Description

Search - This button loads the call entry records based on the specified filter on Selection Criteria section.

Recap Totals - This will preview a list of total orders of the selected driver.

Finalize Orders - This button will generate order based on the selected records displayed in grid area. All records will generate a call entry if no record is selected from the grid area.

Dispatch - All the records on the grid that are selected will be marked as dispatched.

Close - This will close the form.

Selection Criteria - This will let you filter the call entry record on the grid area.

    Fill Method - Use this to filter the Fill Method used by the consumption site. You can select from the combo box list, or manually type on it.

    Product - This allows you to filter a specific product used by the consumption site.

    Location - Use this to filter customer site by consumption sites' location number. User can select from the combo box list, or manually type on it. If field is left blank, the grid area includes all locations.

    Route - User can use the combo box button to select a route value, or manually type on it. If left blank, the grid area includes all Routes.

    Driver - Shows driver shown in the Driver combo box on the Site tab of the Consumption Site screen. You can use the combo box button to select a value, or manually filter and type one in.

    Est % Full - Use this to enter Estimated % value. This allows you to filter customer site with specific Est % Left value. User can enter Est % Full with values greater than the site's Est % and determine those with lesser tank percentage.

    Next Degree Day - This allows you to filter customer site with specific Next Degree Day value. User can enter Next Degree Day value from Clock Reading's Accumm DD and compare if its greater than to site's Next Degree Day value.

    Next Julian Date - Use this to filter customer site having a specific or < Next Julian Date value. You can use the date picker or manually enter a date value on the field.

    Pending Orders - By default, this is set to Include. Selecting 'Include' from the combo box allows you to filter all sites regardless if it has call entry or none. 'Exclude' option allows you to filter customer sites with no call entry while selecting 'Only' option allows you to filter sites with call entry.

    On Hold - By default, this is set to Exclude. Selecting 'Include' from the combo box allows you to filter all sites regardless if its tagged as On Hold or not. 'Exclude' option allows you to filter customer sites that are Off Hold while selecting 'Only' option allows you to filter sites that is currently On Hold.

    Past Due - By default, this is set to Exclude. Selecting 'Include' from the combo box allows you to filter all sites regardless if the customer has past due balances. 'Exclude' option allows you to filter customer sites with no past dues while selecting 'Only' option allows you to filter sites past due balances only.

    Over Credit Limit - By default, this is set to Include. Selecting 'Include' from the combo box allows you to filter all sites regardless if the customer has credit over limit or none. 'Exclude' option allows you to filter customer sites with no over credit limit while selecting 'Only' option allows you to filter over credit limit amounts only.

    Budget Customers - By default, this is set to Include. Selecting 'Include' from the combo box allows you to filter all sites regardless if they are budgeted or not. 'Exclude' option allows you to filter customer sites where customer has no budget setup while selecting 'Only' option allows you to filter budgeted customer with sites.

Pages

- How to Generate an Order
- How to Dispatch Generated Orders
- How to Recap Totals