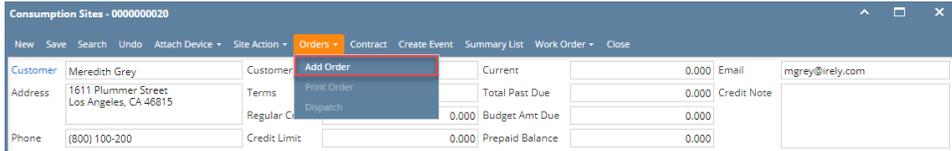


# How to Generate an Order

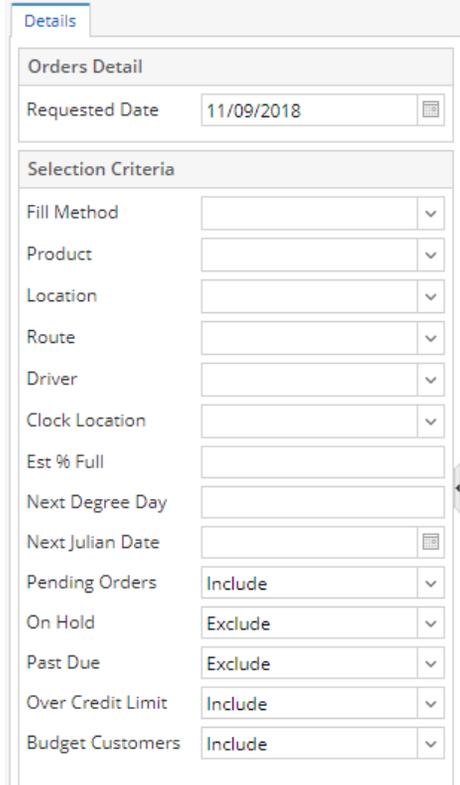
- **Via the Consumption Sites screen:**

1. [Open the Consumption Sites record](#) wherein the site has no Call Order. This means that the Add Order button is visible on the toolbar.
2. Click the **Orders > Add Order** toolbar button.



- **Via the Generate Orders screen:**

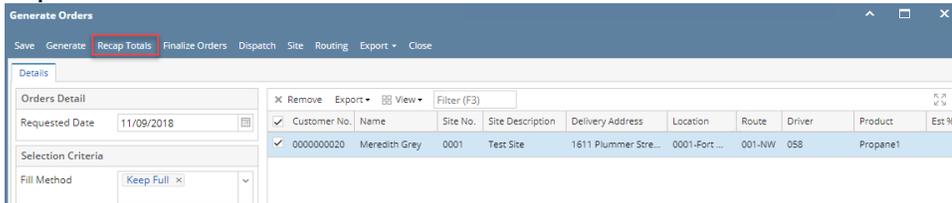
1. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.
2. Filter the records in the grid using the fields in the **Selection Criteria** panel.



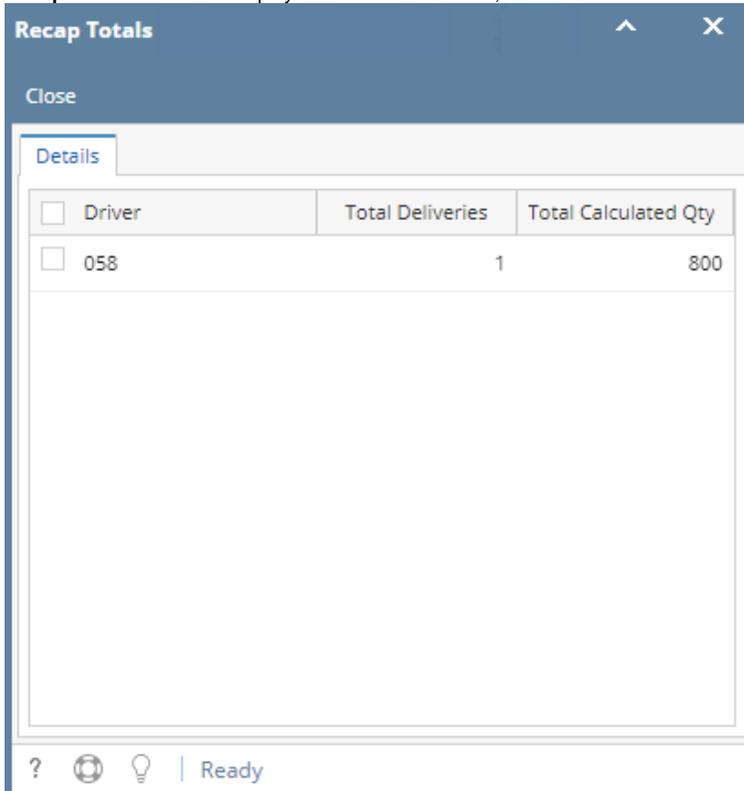
3. Click the **Generate** toolbar button.



4. To review the generated drivers and total number of deliveries and calculated quantity, select the specific customer sites then click the **Recap Totals** toolbar button.



5. **Recap Totals** screen will display. This will list the driver, total deliveries and total calculated quantity of the selected customer sites.

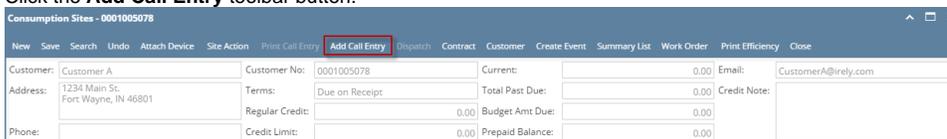


6. Select the consumption site record in the grid, and then click the **Finalize Orders** toolbar button. This will create orders on the selected records.



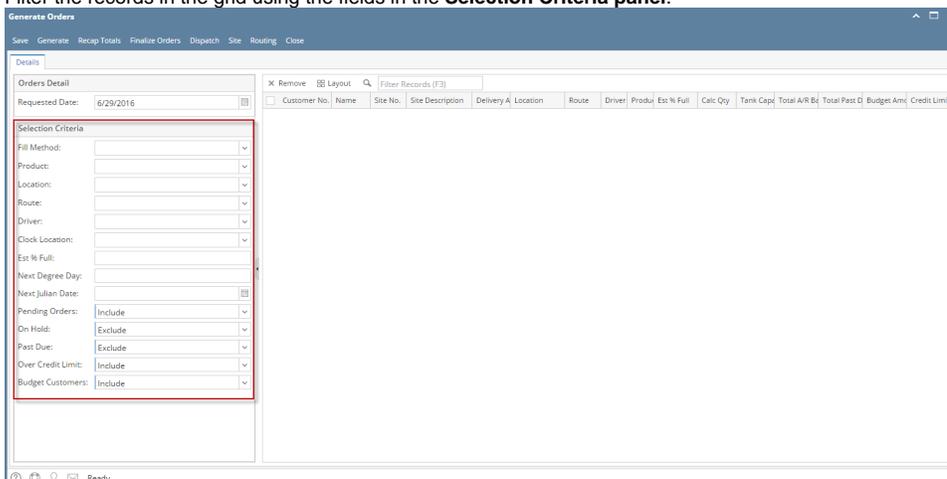
• **Via the Consumption Sites screen:**

1. **Open the Consumption Sites record** wherein the site has no Call Entry. This means that the Add Call Entry button is visible on the toolbar.
2. **Click the Add Call Entry toolbar button.**



• **Via the Generate Orders screen:**

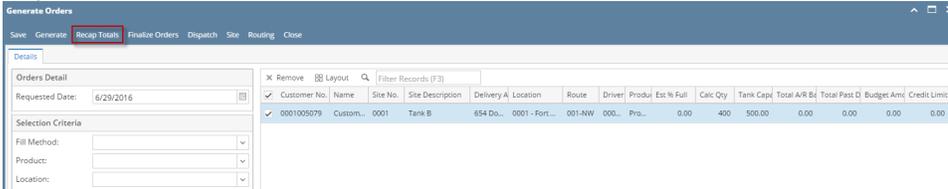
1. On the Menu panel, click the **Generate Orders menu**. This will open the Generate Orders screen.
2. **Filter the records in the grid using the fields in the Selection Criteria panel.**



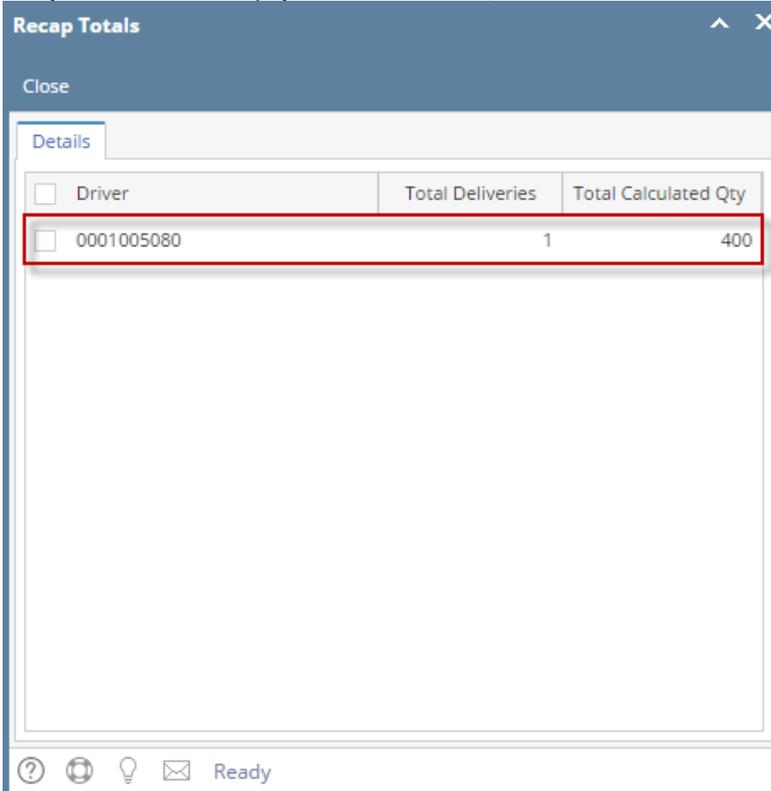
- Click the **Generate** toolbar button.



- To review the generated drivers and total number of deliveries and calculated quantity, select the specific customer sites then click the **Recap Totals** toolbar button.



- Recap Totals** screen will display. This will list the driver, total deliveries and total calculated quantity of the selected customer sites.

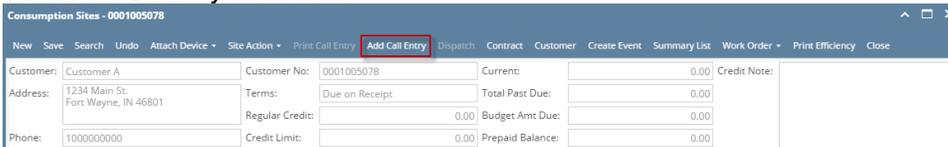


- Select the consumption site record in the grid, and then click the **Finalize Orders** toolbar button. This will create orders on the selected records.



- Via the Consumption Sites screen:**

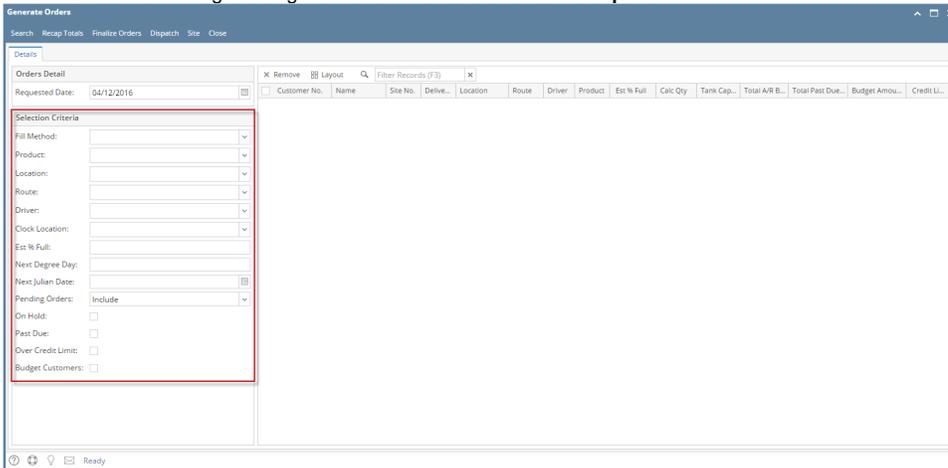
- Open the [Consumption Sites](#) record wherein the site has no Call Entry. This means that the Add Call Entry button is visible on the toolbar.
- Click the **Add Call Entry** toolbar button.



- Via the Generate Orders screen:**

- On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.

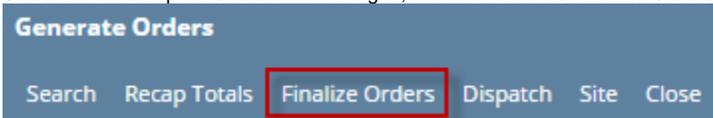
2. Filter the records in the grid using the fields in the **Selection Criteria** panel.



3. Click the **Search** toolbar button.

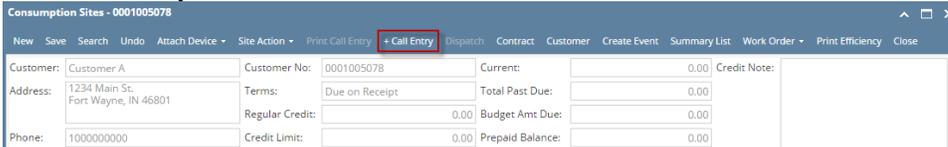


4. Select the consumption site record in the grid, and then click the **Finalize Orders** toolbar button.



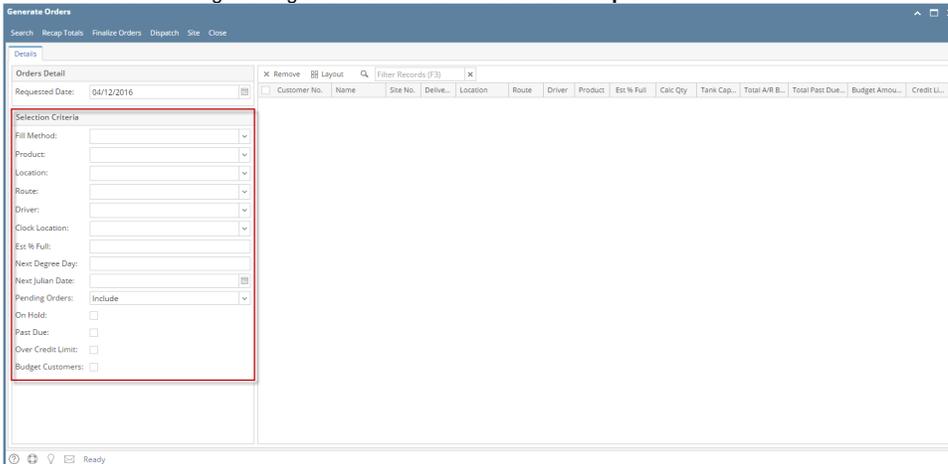
• **Via the Consumption Sites screen:**

1. [Open the Consumption Sites record](#) wherein the site has no Call Entry. This means that the Call Entry button has a + sign on its icon.
2. Click the **+Call Entry** toolbar button.

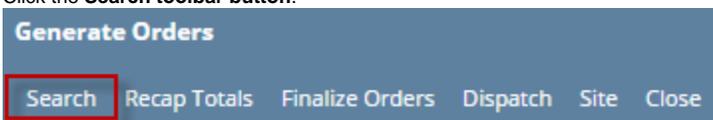


• **Via the Generate Orders screen:**

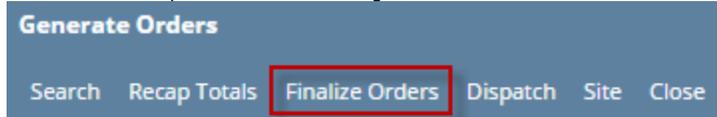
1. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.
2. Filter the records in the grid using the fields in the **Selection Criteria** panel.



3. Click the **Search** toolbar button.

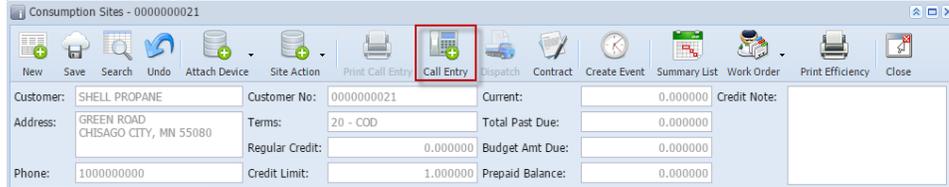


4. Select the consumption site record in the grid, and then click the **Finalize Orders** toolbar button.



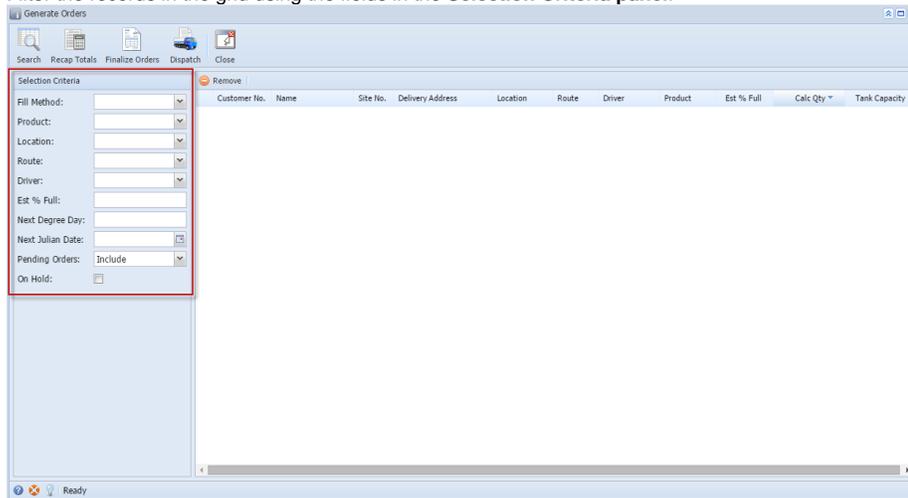
- **Via the Consumption Sites screen:**

1. Open the **Consumption Sites** record wherein the site has no Call Entry. This means that the Call Entry button has a + sign on its icon.
2. Click the **Call Entry** toolbar button.

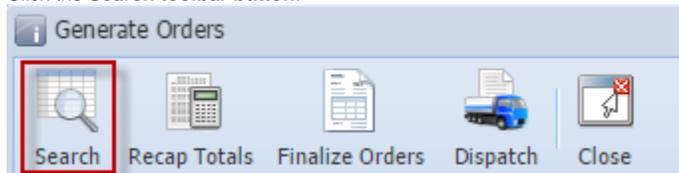


- **Via the Generate Orders screen:**

1. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.
2. Filter the records in the grid using the fields in the **Selection Criteria** panel.



3. Click the **Search** toolbar button.



4. Select the consumption site record in the grid, and then click the **Finalize Orders** toolbar button.

