

How to Recap Totals

The **Recap Totals** screen is used to view the driver, total deliveries and calculated quantities that has been generated from 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**.

Details

Orders Detail

Requested Date11/09/2018

Selection Criteria

Fill Method

Product

Location

Route

Driver

Clock Location

Est % Full

Next Degree Day

Next Julian Date

Pending OrdersInclude

On HoldExclude

Past DueExclude

Over Credit LimitInclude

Budget CustomersInclude

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

Generate Orders

Save

Generate

Recap Totals

Finalize Orders

Dispatch

Site

Routing

Export

Close

- 4. Select the specific customer sites. Click **Recap Totals toolbar button**.

Generate Orders

Save

Generate

Recap Totals

Finalize Orders

Dispatch

Site

Routing

Export

Close

Details

Orders Detail

Requested Date11/09/2018

Selection Criteria

Fill Method

Keep Full

Remove

Export

View

Filter (F3)

Customer No.	Name	Site No.	Site Description	Delivery Address	Location	Route	Driver	Product	Est %
0000000020	Meredith Grey	0001	Test Site	1611 Plummer Stre...	0001-Fort ...	001-NW	058	Propane1	

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

The Recap Totals screen displays a table with the following data:

Driver	Total Deliveries	Total Calculated Qty
058	1	800

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

The Menu panel lists the following options:

- Tank Management
- Customer Inquiry
- Consumption Sites
- Clock Reading
- Synchronize Delivery History
- Generate Orders**
- Tank Monitor
- Budget Calculation
- Virtual Meter Billing
- Lease
- Deliveries
- Generate Work Orders
- Devices
- Events
- Reports

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

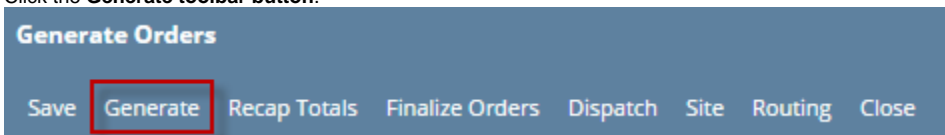
The Generate Orders screen displays a grid of records with the following columns:

Customer No.	Name	Site No.	Site Description	Delivery Address	Location	Route	Driver	Product	Est % Full	Calc Qty	Tank Capacity	Total A/R Balance	Total Paid Due	Budget Amount	Credit Limit	Last Delivery
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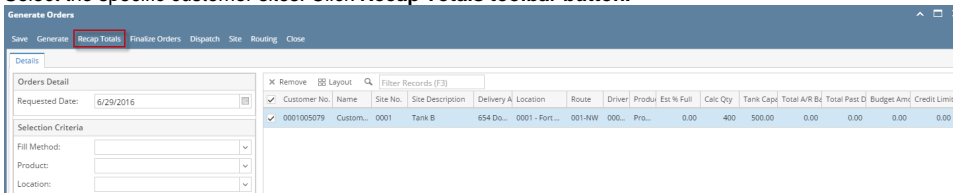
The Selection Criteria panel on the left includes the following fields:

- All Method
- Product
- Location
- Route
- Driver
- Clock Location
- Est % Full
- Next Degree Day
- Next Julian Date
- Pending Orders
- On Hold
- Paid Due
- Over Credit Limit
- Budget Customers

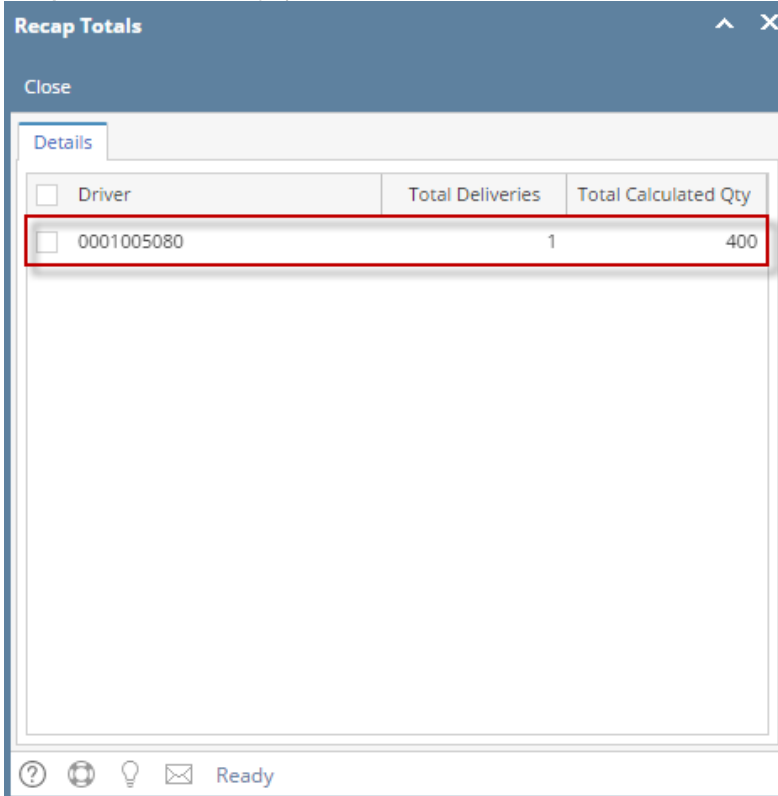
3. Click the **Generate** toolbar button.



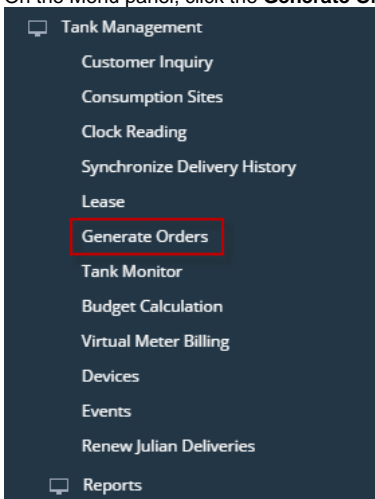
4. Select the specific customer sites. Click **Recap Totals** toolbar button.



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



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.

Generate Orders

Save Generate Recap Totals Finalize Orders Dispatch Site Routing Close

Details

Orders Detail

Requested Date: 6/29/2016

Selection Criteria

Fill Method:

Product:

Location:

Route:

Driver:

Clock Location:

Est % Full:

Next Degree Day:

Next Julian Date:

Pending Orders:

On Hold:

Past Due:

Over Credit Limit:

Budget Customers:

Filter Records (73)

Customer No.	Name	Site No.	Site Description	Delivery A	Location	Route	Driver	Product	Est % Full	Calc Qty	Tank Cap	Total A/R B	Total Past D	Budget Am	Credit Limit
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Ready

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

Generate Orders

Save Generate Recap Totals Finalize Orders Dispatch Site Routing Close

4. Select the specific customer sites. Click **Recap Totals** toolbar button.

Generate Orders

Save Generate Recap Totals Finalize Orders Dispatch Site Routing Close

Details

Orders Detail

Requested Date: 6/29/2016

Selection Criteria

Fill Method:

Product:

Location:

Filter Records (73)

Customer No.	Name	Site No.	Site Description	Delivery A	Location	Route	Driver	Product	Est % Full	Calc Qty	Tank Cap	Total A/R B	Total Past D	Budget Am	Credit Limit
0001005079	Custom...	0001	Tank B	654 Do...	0001 - Fort...	001-NW	000...	Pro...	0.00	400	500.00	0.00	0.00	0.00	0.00

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

Recap Totals

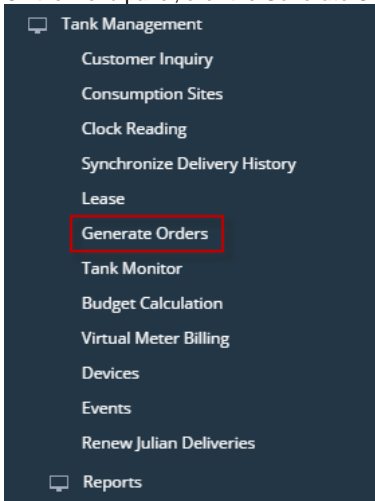
Close

Details

Driver	Total Deliveries	Total Calculated Qty
0001005080	1	400

Ready

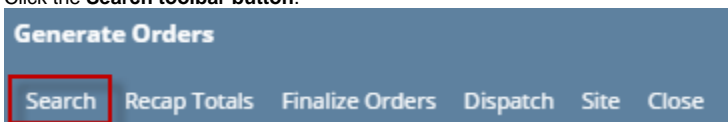
1. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.



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

A screenshot of the 'Generate Orders' application window. The 'Selection Criteria' panel on the left is highlighted with a red rectangle. It contains fields for: Fill Method, Product, Location, Route, Driver, Clock Location, Est % Full, Next Degree Day, Next Julian Date, Pending Orders (set to 'Include'), On Hold, Past Due, Over Credit Limit, and Budget Customers. The main grid is empty, and the status bar at the bottom shows 'Ready'.

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

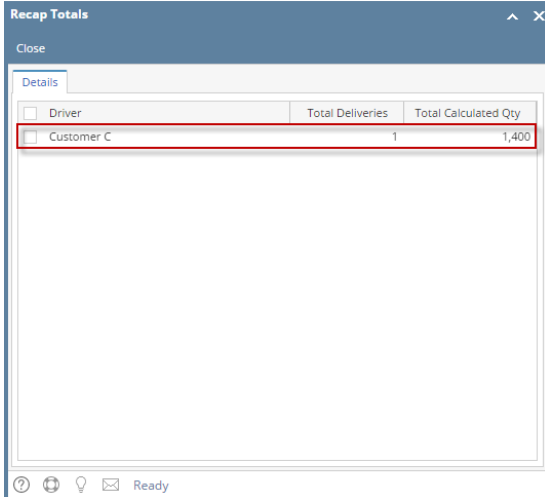


4. Select the specific customer sites. Click **Recap Totals** toolbar button.

A screenshot of the 'Generate Orders' application window. The 'Recap Totals' button in the toolbar is highlighted with a red rectangle. The 'Selection Criteria' panel is filled with values: Fill Method (Keep Full), Product (LPG), Location (0001 - Fort Wayne), Route (001-AW), Driver (000105080), Clock Location (001), Est % Full (0.00), Next Degree Day (0.00), Next Julian Date (00), Pending Orders (Include), On Hold (unchecked), Past Due (unchecked), Over Credit Limit (checked), and Budget Customers (unchecked). The main grid contains two rows of data:

Customer No.	Name	Site No.	Delivery Address	Location	Route	Driver	Product	Est % Full	Calc Qty	Tank Cap.	Total A/R B.	Total Past Due	Budget Amou.	Credit Limit
000105078	Customer A	0002	1234 Main St, Fort Wayne, IN 46801	0001 - Fort...	001-AW	Custo...	Propan...	10.00	1,400	2,000.00	0.00	0.00	0.00	0.00
000105079	Customer B	0002	1234 Main St, Fort Wayne, IN 46801	0001 - Fort...	001-AW	Custo...	Propan...	0.00	400	500.00	0.00	0.00	0.00	0.00

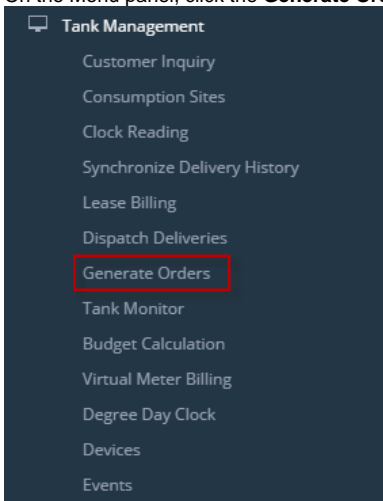
5. **Recap Totals** screen will display. This will list the driver, total deliveries and total calculated quantity of the selected customer sites.



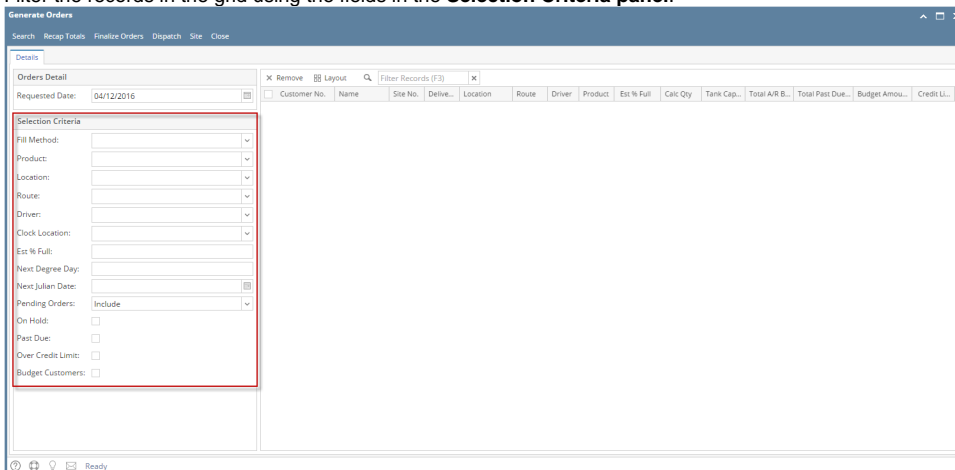
The Recap Totals window displays a table with the following data:

Driver	Total Deliveries	Total Calculated Qty
Customer C	1	1,400

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



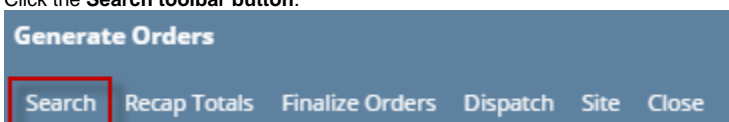
2. Filter the records in the grid using the fields in the **Selection Criteria** panel.



The Generate Orders window displays the Selection Criteria panel, which includes the following fields:

- Fill Method: [Dropdown]
- Product: [Dropdown]
- Location: [Dropdown]
- Route: [Dropdown]
- Driver: [Dropdown]
- Clock Location: [Dropdown]
- Est % Full: [Text]
- Next Degree Day: [Text]
- Next Julian Date: [Text]
- Pending Orders: [Include] [Dropdown]
- On Hold: [Checkbox]
- Past Due: [Checkbox]
- Over Credit Limit: [Checkbox]
- Budget Customers: [Checkbox]

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



4. Select the specific customer sites. Click **Recap Totals** toolbar button.

Generate Orders

Search **Recap Totals** Finalize Orders Dispatch Site Close

Details

Orders Detail

Requested Date: 04/12/2016

Selection Criteria

Fill Method: Keep Full X Julian Calendar X

Product: LPG X D20 X

Location: 0001 - Fort Wayne X

Router: 001-NW X

Driver: 000105080 X

Clock Location: 001 X

Est. % Full: 0.00

Next Degree Day: 0.00

Next Julian Date:

Pending Orders: Include

On Hold: ☐

Past Due: ☐

Over Credit Limit: ☒

Budget Customers: ☐

Customer No.	Name	Site No.	Delivery Address	Location	Route	Driver	Product	Est. Qty.	Calc. Qty.	Tank Cap.	Total AIR B.	Total First Due.	Budget Amou.	Credit Limit.
000105078	Customer A	0002	1234 Main St, Fort Wayne, IN 46801	0001 - Fort...	001-NW	Custo...	Propan...	16.00	1,400	2,900.00	0.00	0.00	0.00	0.00
000105079	Customer B	0002	1234 Main St, Fort Wayne, IN 46801	0001 - Fort...	001-NW	Custo...	Propan...	0.00	400	300.00	0.00	0.00	0.00	0.00

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

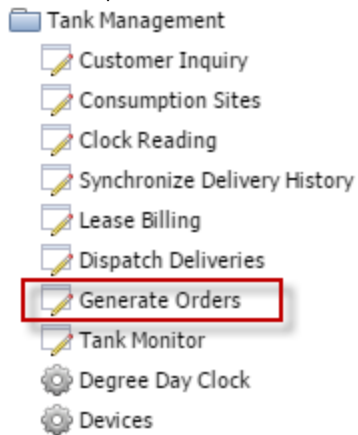
Recap Totals

Close

Details

Driver	Total Deliveries	Total Calculated Qty
Customer C	1	1,400

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.

Generate Orders

Search Recap Totals Finalize Orders Dispatch Close

Selection Criteria

Fill Method:

Product:

Location:

Route:

Driver:

Est % Full:

Next Degree Day:

Next Julian Date:

Pending Orders:

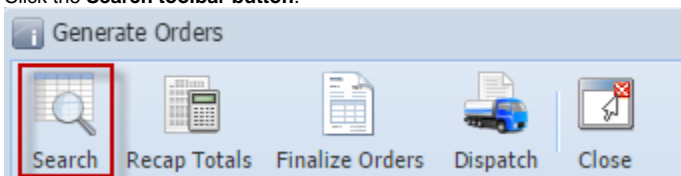
On Hold: ☐

Remove

Customer No.	Name	Site No.	Delivery Address	Location	Route	Driver	Product	Est % Full	Calc Qty	Tank Capacity
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Ready

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



4. Select the specific customer sites. Click **Recap Totals** toolbar button.

Generate Orders

Search Recap Totals Finalize Orders Dispatch Close

Selection Criteria

Fill Method: Will Call

Product: 1131

Location: 063

Route: 063

Driver: Company

Est % Full:

Next Degree Day:

Next Julian Date:

Pending Orders: Include

On Hold: ☐

Remove

Customer No.	Name	Site No.	Delivery Address	Location	Route	Driver	Product	Est % Full	Calc Qty	Tank Capacity
0000000021	SHELL PROPANE	0001	GREEN ROAD CHESAGO...	063	063	Company	Premium Diesel	0.00	0	500.00

Ready

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

Recap Totals

Close

Driver	Total Deliveries	Total Calculated Qty
Company	1	0

Ready