

# How to Dispatch Generated Orders

There are two ways to dispatch the generated orders:

- 1. Via Consumption Site screen.
- 2. Via Generated Orders.  
See [How to Dispatch Delivery](#)

## Via Generated Orders

- 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. Use **Pending Orders = 'Include' or 'Only'** to filter consumption site that has call order.

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 to display consumption sites on grid based on the filtered criteria.

Generate Orders

Save

Generate

Recap Totals

Finalize Orders

Dispatch

Site

Routing

Export

Close

- 4. Select the specific customer site. Click **Dispatch** 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

X 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	

Here's what happens after a delivery has been successfully dispatched.

- The **Dispatch** toolbar button will toggle to **Cancel Dispatch** button.
- The Call Entry tab will be marked as '**Dispatched**'
- **Dispatched Date** field will have a date value.
- An **email** will be sent to the driver.

**Consumption Sites - 0000000020**

New Save Search Undo Attach Device Site Action **Orders** Contract Create Event Summary List Work Order Close

Customer	Meredith Grey	Customer	Print Order	Current	0.000	Email	mgrey@irely.com
Address	1611 Plummer Street Los Angeles, CA 46815	Terms	Cancel Dispatch	Total Past Due	0.000	Credit Note	
Phone	(800) 100-200	Regular C	Remove Order	0.000	Budget Amt Due	0.000	
		Credit Limit		0.000	Prepaid Balance	0.000	

Showing 1 Consumption S...

Site	Detail	Devices	Associated Sites	Order	Appliances	Deliveries	Events	Work Orders(1)	Attachment	Audit Log
1611 Plummer Street	Test Site			Dispatched						

Percent Left: 0 Original % Left: 0 Calc. Qty: 800 Driver: Jeff the Driver

Product: Propane1 Substitute: Desired Qty: 0 Lock Price: ☐ Printed: No

Requested Date: 11/09/2018 Priority: Reg Price: 2,366,000 Leak Check: ☐

Comments: Automatic Order Total: 1,987.44 Terms: Net 30

Order Status: Dispatched Received ☐ Call in Date: 11/09/2018 Dispatched Date: 11/09/2018 Ticket Assigned: TMO-150

Entered By: irelyadmin



#### Note

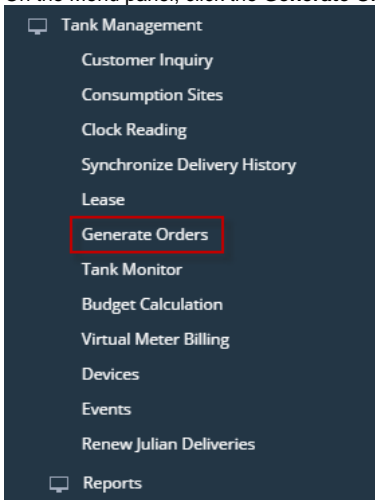
Dispatching deliveries via Delivery Dispatching screen is no longer available. Delivery Dispatching menu and screen has been obsoleted in 16.1 and higher versions.

There are two ways to dispatch the generated orders:

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- Filter the records in the grid using the fields in the **Selection Criteria** panel. Use **Pending Orders = 'Include' or 'Only'** to filter consumption site that has call entry.

- Click the **Generate** toolbar button to display consumption sites on grid based on the filtered criteria.

- Select the specific customer site. Click **Dispatch** toolbar button.

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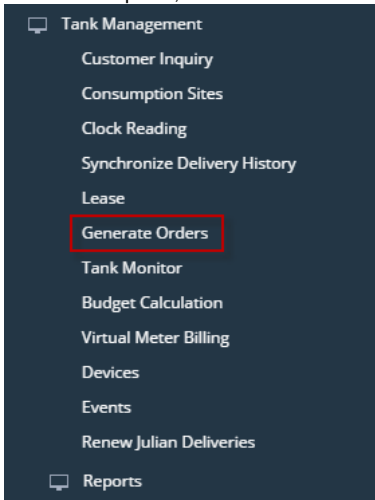
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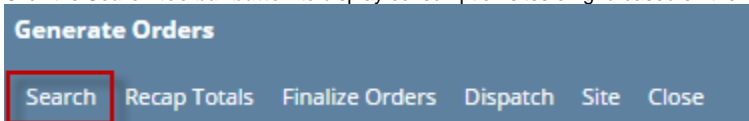
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2. Filter the records in the grid using the fields in the **Selection Criteria** panel. Use **Pending Orders = 'Include' or 'Only'** to filter consumption site that has call entry.

 The 'Generate Orders' window is shown with the 'Details' tab selected. The 'Selection Criteria' panel on the left is highlighted with a red box. It contains various filters: Fill Method (dropdown), Product (dropdown), Location (dropdown), Route (dropdown), Driver (dropdown), Clock Location (dropdown), Est % Full (input), Next Degree Day (input), Next Julian Date (calendar icon), Pending Orders (dropdown set to 'Include'), On Hold (checkbox), Past Due (checkbox), Over Credit Limit (checkbox), and Budget Customers (checkbox). The main grid area is currently empty.

3. Click the **Search** toolbar button to display consumption sites on grid based on the filtered criteria.



4. Select the specific customer site. Click **Dispatch** toolbar button.

 The 'Generate Orders' window is shown with the 'Details' tab selected. The 'Selection Criteria' panel is still visible on the left. The main grid now displays two records. The 'Dispatch' button in the toolbar is highlighted with a red box.
 

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
0001005078	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
0001005079	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

Here's what happens after a delivery has been successfully dispatched.

- The **Dispatch toolbar button** will toggle to **Cancel Dispatch button**.
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Consumption Sites - 0001005078

NewSaveSearchUndoAttach DeviceSite ActionPrint Call EntryRemove Call EntryDispatchContractCustomerCreate EventSummary ListWork OrderPrint EfficiencyClose

Customer:Customer ACustomer No:0001005078Current:0.00Credit Note:

Address:1234 Main St.  
Fort Wayne, IN 46801Terms:Due on ReceiptTotal Past Due:0.00

Phone:1000000000Regular Credit:0.00Budget Amt Due:0.00

Credit Limit:0.00Prepaid Balance:0.00

Showing 1 Consumption Site

+Filter Records (F3)

Address	Description
1234 Main St.	Tank A

SiteDetailDevicesAssociated SitesAppliancesCall EntryDelivery HistoryEvent HistoryWork OrdersAttachment (0)Audit Log (2)

Dispatched

Percent Left:10.00Calculated Qty:1,400Desired Qty:0.00Driver:Customer C

Product:PropaneSubstitute:Spcl Price:1.3000Lock Price:Printed:No

Requested Date:04/12/2016Priority:Total:1,820.00Terms:Due on Receipt

Comments:Entered By:irelyadmin

Order Status:DispatchedCall in Date:04/12/2016Dispatched Date:04/12/2016Ticket Assigned:TMO-44

Actual Delivered Information

Date:Time:Qty:Price:Total:

i

Note

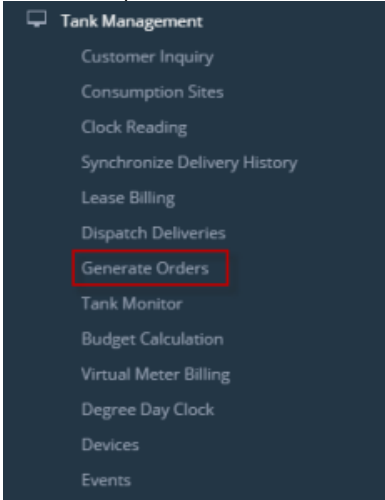
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There are three ways to dispatch the generated orders:

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2. Via Delivery Dispatching screen. See [How to Dispatch Delivery](#)
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Via Generated Orders

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- Click the **Search** toolbar button to display consumption sites on grid based on the filtered criteria.

- Select the specific customer site. Click **Dispatch** toolbar button.

Here's what happens after a delivery has been successfully dispatched.

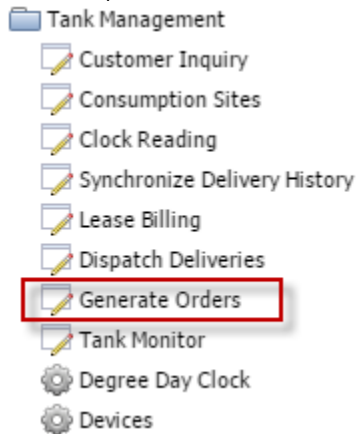
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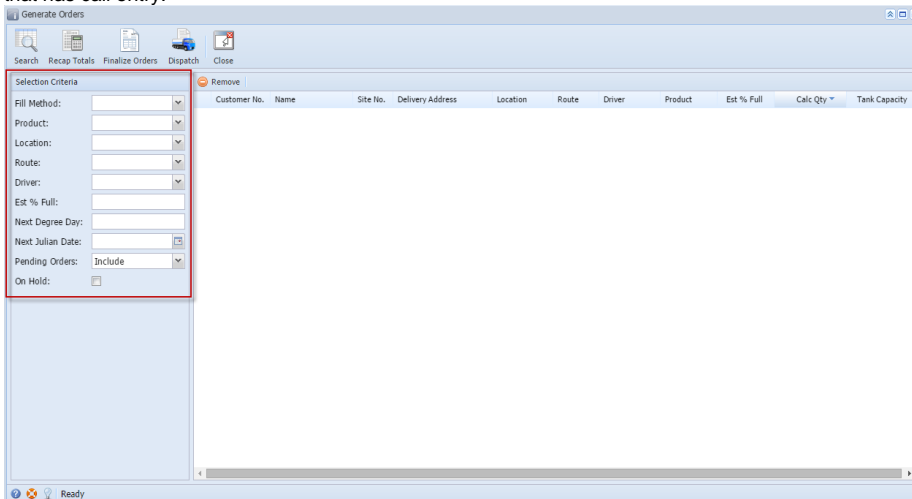
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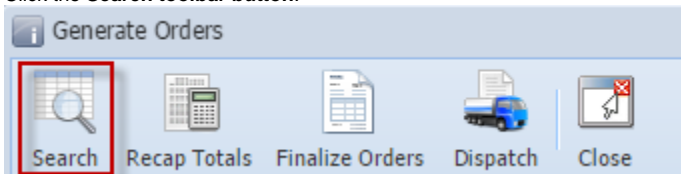
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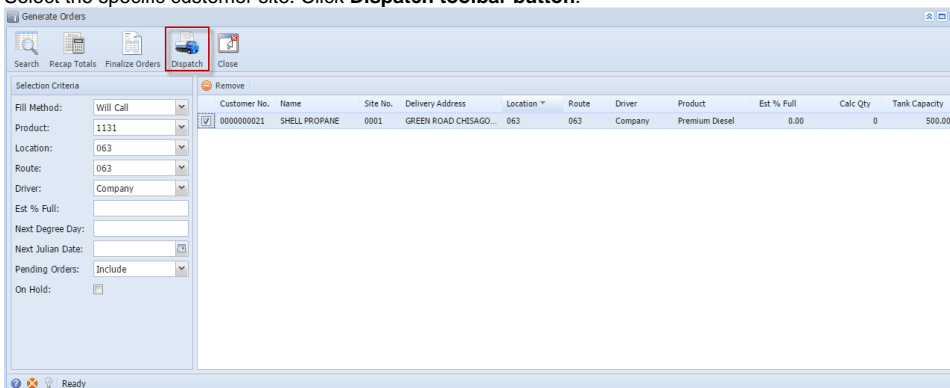
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3. Click the **Search** toolbar button.



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Consumption Sites - 0000000021

New Save Search Undo Attach Device Site Action Print Call Entry Call Entry Cancel Dispatch Contract Create Event Summary List Work Order Print Efficiency Close

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note:  
Address: GREEN ROAD CHISAGO CITY, MN 55080 Terms: 20 - COD Total Past Due: 0.000000  
Regular Credit: 0.000000 Budget Amt Due: 0.000000  
Phone: 1000000000 Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 1 Consumption Site << Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders

Filter Records (F3)

Address	Description
GREEN ROAD	Site 1

Dispatched

Percent Left: 0.000000% Calculated Qty: 0.000000 Desired Qty: Driver: Company  
Product: Premium Diesel Substitute: Reg Price: 0.0000 Printed: No  
Requested Date: 06/04/2015 Priority: Total: 0.000000  
Comments: this is a sample call entry Entered By: AGADMIN  
Order Status: Dispatched Call in Date: 06/04/2015 Dispatched Date: 06/04/2015 Ticket Assigned: TMO-7