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.

| Consumpti | Consumption Sites - 000000020 | | | | | | | | | |
|-----------|--|------------|-----------------------------|---------|-----------------|-------|-------------|-----------------|--|--|
| New Save | | | Orders - Contract Create Ev | rent Su | | | | | | |
| Customer | Meredith Grey | Customer | Add Order | | Current | 0.000 | Email | mgrey@irely.com | | |
| Address | 1611 Plummer Street Los Angeles, CA 46815 | Terms | | | Total Past Due | 0.000 | Credit Note | | | |
| | Los Angeles, ex 40015 | Regular C | Dispatch | 0.000 | Budget Amt Due | 0.000 | | | | |
| Phone | (800) 100-200 | Credit Lim | it | 0.000 | Prepaid Balance | 0.000 | | | | |

• 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.

| Orders Detail | | |
|--------------------|------------|---|
| Requested Date | 11/09/2018 | |
| Selection Criteria | | |
| Fill Method | | ~ |
| Product | | ~ |
| Location | | ~ |
| Route | | ~ |
| Driver | | ~ |
| Clock Location | | ~ |
| Est % Full | | |
| Next Degree Day | | |
| Next Julian Date | | |
| Pending Orders | Include | ~ |
| On Hold | Exclude | ~ |
| Past Due | Exclude | ~ |
| Over Credit Limit | Include | ~ |
| Budget Customers | Include | ~ |

3. Click the Generate toolbar button.

| Gener | ate Orders | • | | | | | | | |
|-------|------------|--------------|-----------------|----------|------|---------|----------|-------|---|
| Save | Generate | Recap Totals | Finalize Orders | Dispatch | Site | Routing | Export + | Close | |
| | | | | | | | | | _ |

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

| • | Generate Orders | | | | | | | | | | | | | ~ |
|---|--------------------|---------------------------|-------|---|--------------|----------------|-------------|------------------|-------------------|-----------|--------|--------|----------|-------------|
| | Save Generate Ree | ap Totals Finalize Orders | Dispa | | Site Routing | | | | | | | | | |
| ľ | Details | | | | | | | | | | | | | |
| L | Orders Detail | | | × | Remove Expo | ort • 🔠 View • | Filter (F3) | | | | | | | К Л 12 У |
| L | Requested Date | 11/09/2018 | | ~ | Customer No. | Name | Site No. | Site Description | Delivery Address | Location | Route | Driver | Product | Est % |
| l | Selection Criteria | | | ~ | 000000020 | Meredith Grey | 0001 | Test Site | 1611 Plummer Stre | 0001-Fort | 001-NW | 058 | Propane1 | |
| l | Fill Method | Keep Full × | ~ | | | | | | | | | | | |
| L | | | | | | | | | | | | | | |

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

| Recap Totals | | ^ X |
|--------------|------------------|----------------------|
| Close | | |
| Details | | |
| Driver | Total Deliveries | Total Calculated Qty |
| 058 | 1 | 800 |
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| ? 🗘 🖓 Ready | | |

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.

| Gener | ate Orders | 5 | | | | | | |
|-------|------------|--------------|-----------------|----------|------|---------|----------|-------|
| Save | Generate | Recap Totals | Finalize Orders | Dispatch | Site | Routing | Export + | Close |

• 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.

| Consumpti | ion Sites - 0001005078 | | | | | | ^ 🗆 × |
|-----------|---------------------------------------|--------------------|----------------------------------|------------------|-------------------------------|-----------------|---------------------|
| New Save | e Search Undo Attach Device Site Acti | on Print Call Entr | Add Call Entry Dispatch Contract | Customer Create | Event Summary List Work Order | Print Efficienc | y Close |
| Customer: | Customer A | Customer No: | 0001005078 | Current: | 0.00 | Email: | CustomerA@irely.com |
| Address: | 1234 Main St. Fort Wayne, IN 46801 | Terms: | Due on Receipt | Total Past Due: | 0.00 | Credit Note: | |
| | | Regular Credit: | 0.00 | Budget Amt Due: | 0.00 | | |
| Phone: | | Credit Limit: | 0.00 | Prepaid Balance: | 0.00 | | |

• Via the Generate Orders screen:

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

| Requested Date: 6/ | | | | | | Records (F3) | | | | | | | | | | | |
|----------------------|----------|---|----------|---------|----------|------------------|------------|----------|-------|----------|---------------|----------|-----------|--------------|--------------|------------|----------|
| | /29/2016 | | Customer | No. Nam | Site No. | Site Description | Delivery A | Location | Route | Driver P | rodu Est % Fu | Calc Qty | Tank Cape | Total A/R Ba | Total Past D | Budget Amo | Credit L |
| Selection Criteria | | 1 | | | | | | | | | | | | | | | |
| ill Method: | ~ | | | | | | | | | | | | | | | | |
| Product: | ~ | | | | | | | | | | | | | | | | |
| ocation: | ~ | | | | | | | | | | | | | | | | |
| loute: | ~ | | | | | | | | | | | | | | | | |
| Driver: | ~ | | | | | | | | | | | | | | | | |
| lock Location: | ~ | | | | | | | | | | | | | | | | |
| st % Full: | | | | | | | | | | | | | | | | | |
| lext Degree Day: | | | | | | | | | | | | | | | | | |
| lext Julian Date: | | | | | | | | | | | | | | | | | |
| ending Orders: In | nclude ~ | | | | | | | | | | | | | | | | |
| In Hold: Ei | xclude ~ | | | | | | | | | | | | | | | | |
| ast Due: Ei | xclude ~ | | | | | | | | | | | | | | | | |
| | nclude ~ | | | | | | | | | | | | | | | | |
| Budget Customers: In | nclude ~ | | | | | | | | | | | | | | | | |

3. Click the Generate toolbar button.

| Gener | ate Orders | | | | | | |
|-----------|---------------|-------------------|----------------------|---------------|---------|----------------|---------------|
| Save | Generate | Recap Totals | Finalize Orders | Dispatch | Site | Routing | Close |
| To review | the generated | drivers and total | number of deliveries | and calculate | ed quan | tity select th | e specific cu |

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

| Generate Orders | | | | | | | | | | | | | | | | | | ^ 🗆 > |
|--------------------|--|---|----------------------------------|---------|----------|------------------|------------|-------------|--------|--------|---------|-----------|----------|-----------|--------------|--------------|------------|--------------|
| Save Generate Rec | e Generate Ascuerzouth Finalise Orders: Dispatch Site Routing Olse | | | | | | | | | | | | | | | | | |
| Details | | | | | | | | | | | | | | | | | | |
| Orders Detail | | | × Remove 88 L | ayout C | Filter R | ecords (F3) | | | | | | | | | | | | |
| Requested Date: | 6/29/2016 | | Customer No. | Name | Site No. | Site Description | Delivery A | Location | Route | Driver | Produ E | st % Full | Calc Qty | Tank Cape | Total A/R Ba | Total Past D | Budget Amo | Credit Limit |
| Selection Criteria | | | 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 |
| Fill Method: | | ~ | | | | | | | | | | | | | | | | |
| Product: | | ~ | | | | | | | | | | | | | | | | |
| Location: | | ~ | | | | | | | | | | | | | | | | |

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

| Recap Totals | | ~ X |
|---------------|------------------|----------------------|
| Close | | |
| Details | | |
| Driver | Total Deliveries | Total Calculated Qty |
| 0001005080 | 1 | 400 |
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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.

| Generate Orders | | |
|--------------------------|-----------------------------|--------------------|
| Save Generate Recap Tota | ls Finalize Orders Dispatch | Site Routing Close |

• 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.

| Consumption Sites - 0001005078 | | | | | | | | | | | | |
|--------------------------------|---------------------------------------|-----------------------|---------------------------|------|------------------|------------------|--------------|--------------|------------------|--|--|--|
| New Save | e Search Undo Attach Device + | Site Action + Print (| Call Entry Add Call Entry | | Contract Custon | ner Create Event | Summary List | Work Order 👻 | Print Efficiency | | | |
| Customer: | Customer A | Customer No: | 0001005078 | | Current: | | 0.00 | Credit Note: | | | | |
| | 1234 Main St. Fort Wayne, IN 46801 | Terms: | Due on Receipt | | Total Past Due: | | 0.00 | | | | | |
| | Tore wayne, in Hodor | Regular Credit: | | 0.00 | Budget Amt Due: | | 0.00 | | | | | |
| Phone: | 100000000 | Credit Limit: | | 0.00 | Prepaid Balance: | | 0.00 | | | | | |

• 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.

| Search Recap Totals | Finalize Orders Dispatch Site Clos | | | | | | | | | | | | |
|-------------------------------|---|-----------------|------------------|-----------------------|---------------|-----------|---------------|-----------------|----------|-------------|----------------|-------------|----|
| | | | | | | | | | | | | | |
| Details | | | | | | | | | | | | | |
| Orders Detail | | | | Q Filter Records (F3) | × | | | | | | | | |
| Requested Date: | 04/12/2016 | | Customer No. Nam | te Site No. Delive | Location Roun | te Driver | Product Est 9 | 6 Full Calc Qty | Tank Cap | Total A/R B | Total Past Due | Budget Amou | Cr |
| Selection Criteria | | | | | | | | | | | | | |
| Fill Method: | | ~ | | | | | | | | | | | |
| Product: | | ~ | | | | | | | | | | | |
| Location: | | ~ | | | | | | | | | | | |
| Route: | | ~ | | | | | | | | | | | |
| Driver: | | ~ | | | | | | | | | | | |
| Clock Location: | | ~ | | | | | | | | | | | |
| Est % Full: | | | | | | | | | | | | | |
| Next Degree Day: | | | | | | | | | | | | | |
| Next Julian Date: | | | | | | | | | | | | | |
| - | Include | ~ | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Over Credit Limit: | | | | | | | | | | | | | |
| Budget Customers: | | | | | | | | | | | | | |
| booger costoniers. | | | | | | | | | | | | | |
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| Click the | Search toolbar | ' butt | on. | | | | | | | | | | |
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| Comm | | | | | | | | | | | | | |
| Gener | ate Orders | | | | | | | | | | | | |
| Gener | ate Orders | | | | | | | | | | | | |
| Gener | _ | | | | | | | | | | | | |
| | _ | | | e Orders | Dispat | ch | Site | Clos | e | | | | |
| Gener Search | _ | | | e Orders | Dispat | ch | Site | Clos | e | | | | |
| Search | h Recap Tot | tals | Finalize | | | | | | | olbar | - hu#c | n | |
| Search | _ | tals | Finalize | | | | | | | olbar | butto | n. | |
| Search Select the | h Recap Tot | tals | Finalize | | | | | | | olbar | butto | n. | |
| Search Select the | h Recap Tot | tals | Finalize | | | | | | | olbar | butto | n. | |
| Search Select the | h Recap Tot | tals | Finalize | | | | | | | olbar | butto | n. | |
| Search Gelect the Gener | h Recap Tot consumption s rate Orders | tals site re | Finalize | e grid, and | then clic | k the | Finaliz | ze Orde | ers to | olbar | butto | n. | |
| Search Select the | h Recap Tot e consumption s rate Orders | tals site re | Finalize | e grid, and | then clic | k the | Finaliz | | ers to | olbar | butto | n. | |

Via the Consumption Sites screen:

 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.
 Click the +Call Entry toolbar button.

| Consumption Sites - 0001005078 | | | | | | | | | | | |
|--------------------------------|--|-----------------|-----------------------------------|------------------|------|-------------|--|--|--|--|--|
| New Save | e Search Undo Attach Device - | | nt Call Entry + Call Entry Dispat | | | | | | | | |
| Customer: | Customer A | Customer No: | 0001005078 | Current: | 0.00 | redit Note: | | | | | |
| Address: | 1234 Main St. Fort Wayne, IN 46801 | Terms: | Due on Receipt | Total Past Due: | 0.00 | | | | | | |
| | for wayne, in 40001 | Regular Credit: | 0.00 | Budget Amt Due: | 0.00 | | | | | | |
| Phone: | 100000000 | Credit Limit: | 0.00 | Prepaid Balance: | 0.00 | | | | | | |

3.

Search

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.

Recap Totals Finalize Orders Dispatch Site Close

| Details | | | | | | | | | | | | | | | | | | |
|--------------------|------------------|----|----------|---------|------|-------------|----------|----------|-------|--------|---------|------------|----------|----------|-------------|-----------------|-------------|--------|
| Orders Detail | | | × Remove | 88 Layo | ut Q | Filter Reco | rds (F3) | × | | | | | | | | | | |
| Requested Date: | 04/12/2016 | | Custom | ier No. | Name | Site No | Delive | Location | Route | Driver | Product | Est % Full | Calc Qty | Tank Cap | Total A/R B | Total Past Due. | Budget Amou | Credit |
| Selection Criteria | | | | | | | | | | | | | | | | | | |
| Fill Method: | | ~ | | | | | | | | | | | | | | | | |
| Product | | ~ | | | | | | | | | | | | | | | | |
| Location: | | ~ | | | | | | | | | | | | | | | | |
| Route: | | ~ | | | | | | | | | | | | | | | | |
| Driver: | | ~ | | | | | | | | | | | | | | | | |
| Clock Location: | | ~ | | | | | | | | | | | | | | | | |
| Est % Full: | | | | | | | | | | | | | | | | | | |
| Next Degree Day: | | | | | | | | | | | | | | | | | | |
| Next Julian Date: | | | | | | | | | | | | | | | | | | |
| Pending Orders: | Include | ~ | | | | | | | | | | | | | | | | |
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| | | | | | | | | | | | | | | | | | | |
| Over Credit Limit: | | | | | | | | | | | | | | | | | | |
| Budget Customers: | | | | | | | | | | | | | | | | | | |
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| 2098 | Ready | | | | | | | | | | | | | | | | | |
| lick the | Search toolbar I | - | ton | | | | | | | | | | | | | | | |
| mor the | | Ju | lion. | | | | | | | | | | | | | | | |
| C | ate Orders | | | | | | | | | | | | | | | | | |

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.

| Consur | nption Sites - 0000000021 | | | | | | | | | | × 🗆 × |
|-----------|--------------------------------------|-----------------|------------------|------------|-----------|----------|--------------|--------------|--------------|------------------|-------|
| | 🔒 🗖 🖉 🗟 | . 🔒 . | | t i | | 1 | R | | . 🖏 | | 7 |
| New | Save Search Undo Attach Devi | ce Site Action | Print Call Entry | Call Entry | Dispatch | Contract | Create Event | Summary List | t Work Order | Print Efficiency | Close |
| Customer: | SHELL PROPANE | Customer No: | 000000021 | - | Current: | | | 0.000000 | Credit Note: | | |
| Address: | GREEN ROAD CHISAGO CITY, MN 55080 | Terms: | 20 - COD | | Total Pa | st Due: | | 0.000000 | | | |
| | | Regular Credit: | | 0.000000 | Budget A | Amt Due: | | 0.000000 | | | |
| Phone: | 100000000 | Credit Limit: | | 1.000000 | Prepaid I | Balance: | | 0.000000 | | | |

• 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.

| | Serierate Orders | | | | | | | | | | | | | |
|------|-------------------|-------------------|----------|--------------|------|------------------|-------------|-----------|-------|--------|---------|------------|------------|-------------|
| | | | 4 | 7 | | | | | | | | | | |
| Sea | arch Recap Totals | s Finalize Orders | Dispatch | h Close | | | | | | | | | | |
| Se | lection Criteria | | | Remove | | | | | | | | | | |
| Fill | Method: | | ~ | Customer No. | Name | Site No. Deliver | / Address l | ocation R | Route | Driver | Product | Est % Full | Calc Qty 🔻 | Tank Capaci |
| Pro | oduct: | | ~ | | | | | | | | | | | |
| Lo | cation: | | ~ | | | | | | | | | | | |
| Ro | ute: | | ~ | | | | | | | | | | | |
| Dri | iver: | | ~ | | | | | | | | | | | |
| Est | t % Full: | | | | | | | | | | | | | |
| Ne | ext Degree Day: | | | | | | | | | | | | | |
| Ne | ext Julian Date: | | | | | | | | | | | | | |
| | | Include | ~ | | | | | | | | | | | |
| On | Hold: | | | | | | | | | | | | | |
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| Cli | ick the S | Search | tool | bar butt | ton. | | | | | | _ | | | |
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4. Select the consumption site record in the grid, and then click the Finalize Orders toolbar button.

| Generate Orders | | | | | | | | | | | |
|-----------------|--------------|-----------------|----------|----------|--|--|--|--|--|--|--|
| Q | | | | F | | | | | | | |
| Search | Recap Totals | Finalize Orders | Dispatch | Close | | | | | | | |