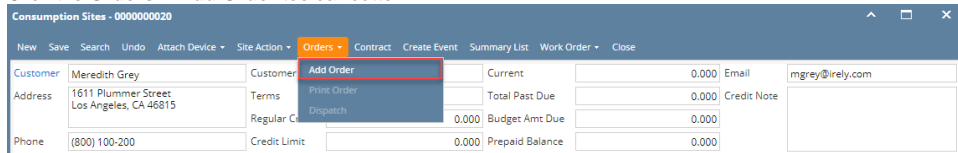


How to Generate an Order

- 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.



Consumption Sites - 0000000020

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

Customer Meredith Grey Customer Add Order Current 0.000 Email mgrey@irely.com

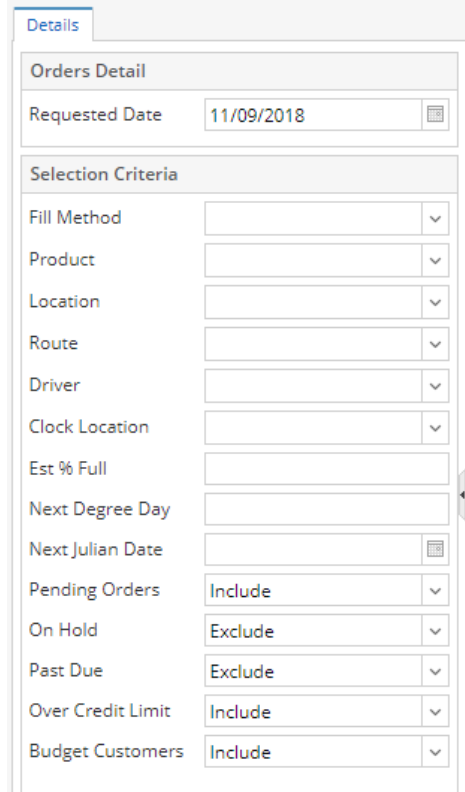
Address 1611 Plummer Street Los Angeles, CA 46815 Terms Print Order Total Past Due 0.000 Credit Note

Phone (800) 100-200 Regular C Dispatch 0.000 Budget Amt Due 0.000

Credit Limit 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.



Details

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

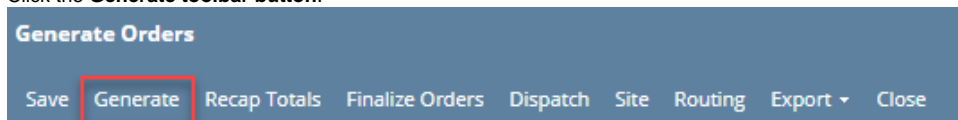
On Hold Exclude

Past Due Exclude

Over Credit Limit Include

Budget Customers Include

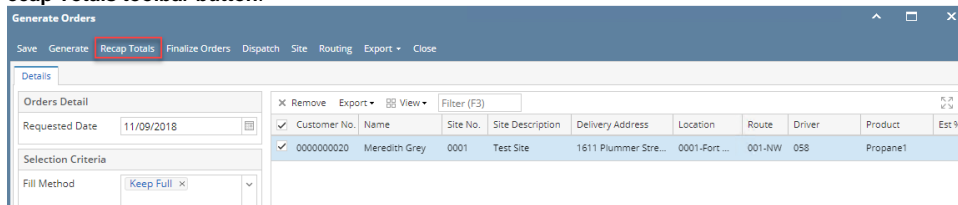
3. Click the **Generate** toolbar button.



Generate 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 **Recap Totals** toolbar button.



Generate Orders

Save Generate Recap Totals Finalize Orders Dispatch Site Routing Export Close

Details

Orders Detail

Requested Date 11/09/2018

Selection Criteria

Fill Method Keep Full

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.

Recap Totals

Close

Details

<input type="checkbox"/> Driver	Total Deliveries	Total Calculated Qty
<input type="checkbox"/> 058	1	800

? ? ? | 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.

Generate Orders

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.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry **Add Call Entry** Dispatch Contract Customer Create Event Summary List Work Order Print Efficiency 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:**

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:

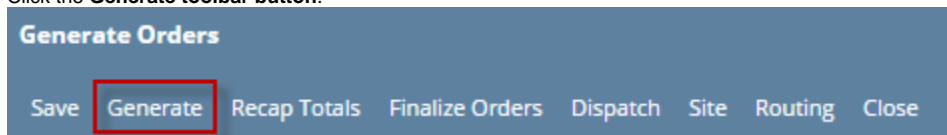
Over Credit Limit:

Budget Customers:

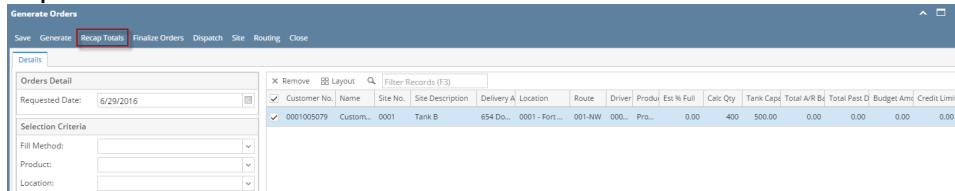
Grid Columns: Customer No, Name, Site No, Site Description, Delivery A, Location, Route, Driver, Product, Est % Full, Calc Qty, Tank Cap, Total A/R B, Total Past D, Budget Amt, Credit Limit

? ? ? | Ready

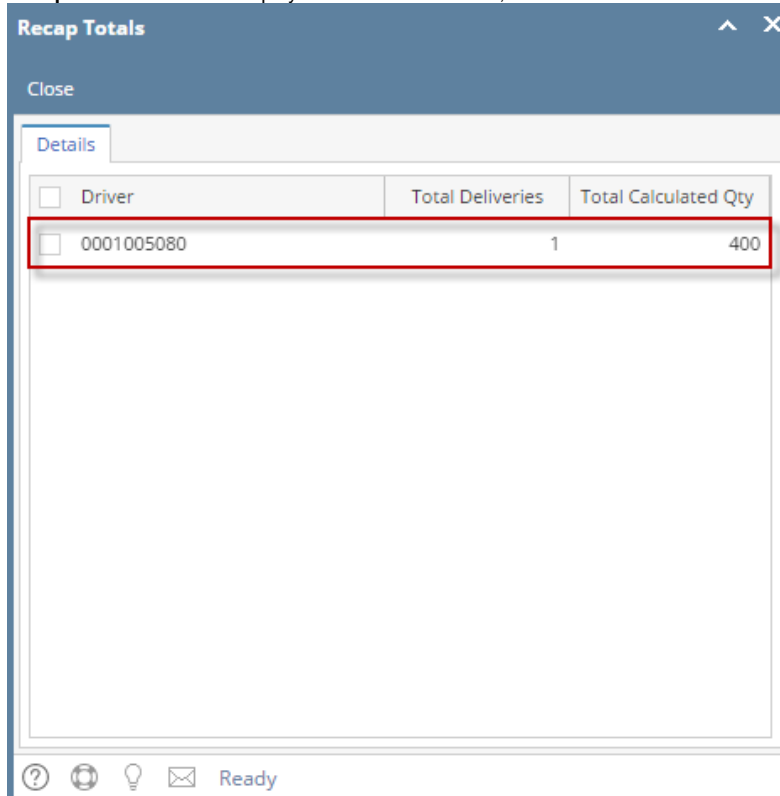
- Click the **Generate** toolbar button.



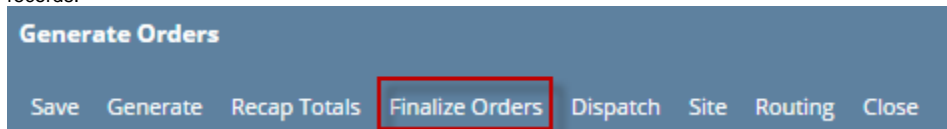
- To review the generated drivers and total number of deliveries and calculated quantity, select the specific customer sites then click the **Recap Totals** toolbar button.



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

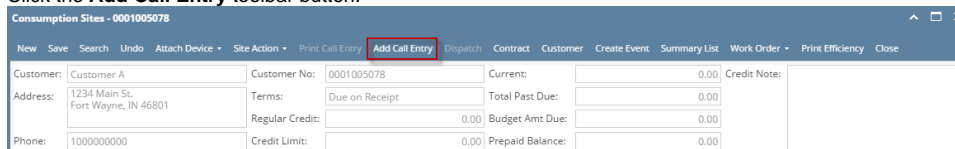


- Select the consumption site record in the grid, and then click the **Finalize Orders** toolbar button. This will create orders on the selected records.



- 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.

The screenshot shows the 'Generate Orders' window. On the left, the 'Selection Criteria' panel is highlighted with a red box. It contains various filters such as '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', and 'Budget Customers'. The main grid on the right is currently empty.

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

This screenshot shows the toolbar of the 'Generate Orders' window. The 'Search' button is highlighted with a red box. Other buttons visible include 'Recap Totals', 'Finalize Orders', 'Dispatch', 'Site', and 'Close'.

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

This screenshot shows the toolbar of the 'Generate Orders' window. The 'Finalize Orders' button is highlighted with a red box. Other buttons visible include 'Search', 'Recap Totals', 'Dispatch', 'Site', and 'Close'.

- 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.

The screenshot shows the 'Consumption Sites - 0001005078' window. The '+Call Entry' button in the toolbar is highlighted with a red box. The main area displays customer information for 'Customer A' at '1234 Main St, Fort Wayne, IN 46801'.

- Via the **Generate Orders** screen:

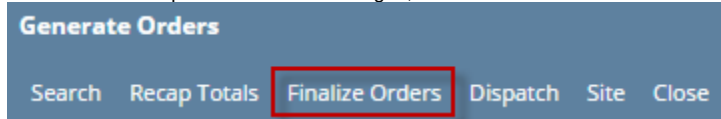
1. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.
2. Filter the records in the grid using the fields in the **Selection Criteria** panel.

This screenshot is identical to the first one, showing the 'Generate Orders' window with the 'Selection Criteria' panel highlighted by a red box.

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

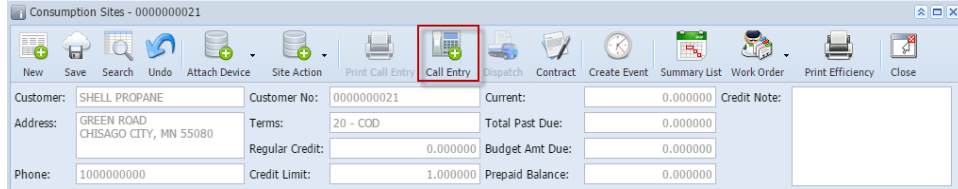
This screenshot is identical to the second one, showing the 'Generate Orders' toolbar with the 'Search' button highlighted by a red box.

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



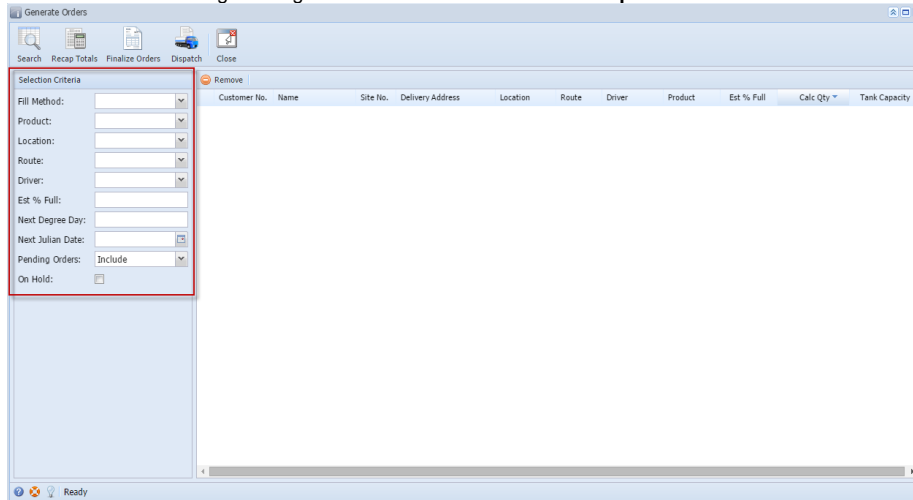
- Via the Consumption Sites screen:

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.

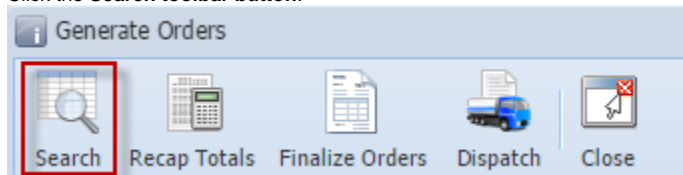


- Via the Generate Orders screen:

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.

