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
? 🗘 🖓 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
⑦ Ø Ø 🖂 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 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:													
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Click the	Search toolbar	' butt	on.										
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	~																
Over Credit Limit:																		
Budget Customers:																		
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:													
				1										
0	🧔 🏆 Ready		[
Cli	ick the S	Search	tool	bar butt	ton.						_			
8	Gen	erate (Orde	ers										
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	4						1	<u>.</u>		24				

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							