How to View Open Orders

The Open Orders Search screen display the lists of active sites with an open order.

Here is how to use and view this report.

- 1. Open Consumption Site screen. Consumption Site Search screen will display focusing on the default tab Site.
- 2. Navigate to Open Order tab. This tab will display all the sites with open call entries.
- 3. Opening a specific call order will automatically open the site focusing on Order tab.
- 4. Open Order details can be customized by right clicking any of the Column Header > Columns. Select/Deselect from the column lists the details you want to display on the search screen.
- The search screen can be also filtered, exported and printed like a report. Click on the Advanced Filter icon (magnifying glass) and select/enter specific filters. Click the same icon to add more filters.
- 6. Hit the Enter Key to apply the filters and display the results.
- 7. The results can be exported via Export button on the following format PDF, Excel, Text, CSV.
- 8. Exporting the records will download a file from the browser. Opening the downloaded exported file will open another browser tab if PDF file while the rest opens on the specific applications available on your computer.

Here's the sample exported records on different format:

ation	Customer Number	Customer Name	Site Number	Description	A03/655	Driver	Order Status	Prioty	Call in Date	Recuested Date	Dispatch Date	Protect	PercentLet	Country .	Price	Tessi	Entered By	Converts	Leak Check
11 - Fort Wayne	1005233	Oustomer A Oustomer B	0001	Tark A	1234 West Main Street Princeton Avenue	Jeff the Driver	Generated		0105/2017	01/05/2017		Propane	0	350	1.35	472.5	indyadmin indyadmin	sample order for tan A sample order for	rk False False
- Foit wayse	1005234	CURDING N	0001	19K a	Princeron Avenue	per the Dever	Generated		01002017	onescon?		Propane	b	400	1.35	D40	reșaone	customer 0	P-3494
	eater than or equal as than or equal to ' a 'Generated'																		
ext	ies																		
ation 1 - Fort Wa 1 - Fort Wa	yne 186	mber Customer N 15233 Customer A 15234 Customer W	0001	ber Descrip Tank A 1234 W Tank B Princet	ist Main Street	Jeff the D	er Status P Siver Generated Siver Generated		Call In Date 01/05/2017 01/05/2017	Requested D. 01/05/2017 01/05/2017	- F	Date Product ropane 0,000.00 ropane 0,000.00	358	Quantity 0,001.3500 0,001.3500	Price Tota 0,472.58 0,540.00	il Entered B irelyadmi irelyadmi	sample	ts Leak order for tank order for cust	A False
ter by: mested Date	is greater t	than or equal to	181/81/28171		1/5/2017, 4:2	9:18 PM													
puested Date	is less that ontains 'Gene	or equal to '8	1/31/2017'																
vested Dati er Status i	is less than	or equal to '8	1/31/2817'																
SV In Call F	is less than ontains 'Gene ntries	i or equal to '6 mated'	1/31/2017'	- Wanton -									an Davida -		6 (1111)	Ded as T		Tex Course -	
spested Dat. Ser Status : Cation, Gt D1 - Fort eff the I lter by:, quested I quested I	is less the ontains 'Gene ntries stomer Num Wayne,100 river,Gene Wayne,100 river,Gene Wayne,101 river,Gene ate is gra ate is len s contains	or equal to '8	r Name, Sit er A,0001,' 2017 12:00 cr B,0001,' 2017 12:00 :43 PM r equal to '0	Tank A,1234 100 AM,1/5/2 Tank B,Print 100 AM,1/5/2 101/01/201	West Main : 2017 12:00: Seton Avenu 2017 12:00:	Street 00 AM,,Proj e	oane,0,350,	1.35,472.5,	irelyadmin,	sample ord	er for tani	A,False,		Percent Le	ft,Quantity	, Frice, Tot	al,Entered	By,Comment	s,Leak C
sected Data sected Data sector (Contemporation) and Call I particular for the I off the I der Statu Excee System System Statu System Statu System Statu System Statu System Statu System Statu System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System System	is less the entains 'Gene ntries stomer Num Wayne,100 river, Gene Wayne, 100 river, Gene Wayne, 100 river, Gene Mayne, 100 river, 100 r	or equal to '9 aber, Custome b5233, Custom rated, , 1/5/ 5/2017, 5:36 siter than o ' 'Generated ' Custome t Custome	r Name, Sit er A,0001, 2017 12100 er 7,0001, 2017 12100 res 7,0001, 2017 12100 res 7,0001, 2017 12100 res 7,000 res 7,000 res 8,000 res 8,000 res 8,000 res 8,000 res 8,000 res 8,000 res 8,000 res 8,000 res 8,000 res 7,000 res 8,000 res 7,000 res 7,0000 res 7,0000 res 7,0000 res 7,0000 res 7,0000	Tank A, 1234 IOO AM, 1/5/1 Tank B, Frind 00 AM, 1/5/1 '01/01/201' (/31/2017' Create Description Gddees Tank B Private	West Hain : 1017 12:00: 1017 10:00: 1017 10:00: 1000: 1000: 1000: 1000: 1000: 1000: 1000: 1000: 1000: 1000: 1000:	Street DO AM,, Proj e DO AM,, Proj	oane, 0, 350, , oane, 0, 400, , Open Call Miter Miter Dave Left the Dave	1.35,472.5, 1.35,540,12 Entries Code State Infoi Generated Generated	irelyadmin, so relyadmin, so iRe	sample order mple order ly U.C sester fotololised so/sest	er for tani for oustor overeet 10 20 Duref product propere	r A, False, ser B, False, /2017, 50762 PM *********** 		Open Call Entr 2001 Open Call Entr 300 (0020-201 400 (0,002.201		iRely LL <u>ByConnects</u> technological for the second	C Look r Lask A FAA r customer (FAA	Dreated: 1/3/2007. Textb 27 32	33753 PM

9. Print the report.

The Open Call Entries Search screen display the lists of active sites with open call entries.

Here is how to use and view this report.

- 1. Open Consumption Site screen. Consumption Site Search screen will display focusing on the default tab Site.
- 2. Navigate to Open Call Entries tab. This tab will display all the sites with open call entries.

Consumption Stees Q	pen Call Ensies Wor	k Onder Leak/Gat	Check Find all	the Torns													
E Vev Q, Fiber I		34 record(s)															
Location	Customer Number	Customer Nome	SteNamber	Description	Address	Driver	Order Status	Priority	Coll in Dote	Requested Date ¥ Dispatch Date	Product.	Percent Left	Quantity	Price	Total	Entered By	Commenta
0001 - Part Wayne	1005233	Customer A	0001	Terk A	1234 West Main Street	Jeff the Driver	Generated		0 1/5/2017	1/5/2017	Propene	0.00	350	1.3500	472.50	irelysdmin	sample order for tank A
 0001 - Part Wayne 	1005234	Customer B	0001	Terk 8	Princeton Avenue	Jeff the Driver	Generated		0 1/5/2017	1/5/2017	Propane	0.00	400	1.3500	540.00	irelyadmin	sample order for customer 8
0001 - Fort Wayne	0000000020	Meredith Grey	0001	Test Sile	1611 Plummer Street	jeff the Driver	Generated		0 1/3/2017	15/25/2016	Propane1	0.00	50	2,3660		irelyadmin	Sample call in order

3. Opening a specific call entry will automatically open the site focusing on Call Entry tab.

Consumption Sites												
Open Recalculate Prices	Export Prices Expo	ort Quantities Lea	ist Cost Routing									
Consumption Sites Ope	en Call Entries Work	Order Leak/Gas	Check Find all I	the Toms								
B View Q Filter Re	ecords (F3)	2 record(s) (1 sele	cted)									
× Requested Date ~	Between 🗸	1/1/2017 🛛 🖽	and 1/31/2017									
× Order Status ×	Contains 🗸	Generated										
Location	Customer Number	Customer Name	Site Number	Description	Address	Driver	Order Status	Priority	Call In Date	Requested Date *	Dispatch Date	Product
 0001 - Fort Wayne 	1005233	Customer A	0001	Tank A	1234 West Main Street	Jeff the Driver	Generated	0	1/5/2017	1/5/2017		Propane

Consump	tion Sites -	100523	3																		^	□ ×
Customer	Customer	A			Cu	stomer N	o: [1005233			G	urrent				0.	00 Ema	ail:	custor	nerA@test	com	
Address:	1234 Wes Fort Wayr					rms: gular Cree		Net 30					st Due: Amt Due:				00 Cree	dit Note:				
Phone:	(100) 100-	1111			Cre	edit Limit:	Ĩ				0.00 P	repaid	Balance:	Ē		0.	00					
Showing	1 Consump	tion Sit	e	+	Site	Detail	Devi	ces As	sociated	Sites	Applian	ces	Call Entry	D	elivery Histor	y Event	History	Work O	rders(0)	Attachm	ent (0)	Aud 🔶
+ Q	Filter Reco	rds (F3)		Per	rcent l	Left:			0.00	Calcul	lated Qty	:	4	00	Desired Qt	y:	350.00	Driver:	j.	eff the Driv	er	~
Address		Des	cription	Pro	duct:		Pro	pane		Subst	itute:			\sim	Reg Price:		1.3500	Lock Pr	rice:	Printed	No	
1234 We	st Main Street	Tan	k A	Re	queste	ed Date:	1/5	/2017		Priori	ty:			\vee	Total:		472.50	Leak Ch	heck:			
				Co	mmer	nts:	sam	nple orde	er for ta	nk A								Terms:	1	Net 30		~
																		Entered	d By:	relyadmin		
				On	der St	atus:	Ger	nerated	Rece	ived:	Call in E)ate:	1/5/2017		Dispatch	hed Date:		1	Ficket A:	signed:	FMO-64	
				A	ctual	Delivered	Info	rmation														
				D	ate:			Time:			Qty:				Price:			To	otal:			
				C	all Ent	try Detail:	5															
				La	st De	livery:					Fill N	lethod		W	III Call		Total (Capacity:			50	0.00
				Fo	orecas	t Run Out	:				Next	Delive	ry DD:			0	Estima	ated % Le	ft:			0.00
				R	oute S	equence:		1-NW	01	D	Seria	il Num	ber:	SN	1234		Estima	ated Gallo	ons Left			0.00
				In	struct	tions:	12	34 Main	Street													
				C	omme	ents:	tes	st site co	mments	5												
•			•																			
? 🗘	0 🖂 F	eady																4	Page	1	of 1	

4. Open Call Entry details can be customized by right clicking any of the Column Header > Columns. Select/Deselect from the column lists the details you want to display on the search screen.

Orde	r Status	P	riority	Call In Date
↓AZ	Sort Ascending			
$\begin{array}{c}\downarrow Z\\ A\end{array}$	Sort Descending			
Q,	Filter			
	Group By			
	Clear Group By			
	Columns 🕨 🕨	\checkmark	Location	r
	Hide Column	\checkmark	Custom	er Number
		\checkmark	Custom	er Name
		\checkmark	Site Nur	mber
		\checkmark	Descrip	tion
		\checkmark	Address	5
		\checkmark	Driver	
		\checkmark	Order S	tatus
		\checkmark	Priority	
		\checkmark	Call In D)ate
		\checkmark	Reques	ted Date
		\checkmark	Dispate	h Date
		\checkmark	Product	
		\checkmark	Percent	Left
		\checkmark	Quantit	у
		\checkmark	Price	
		\checkmark	Total	
		\checkmark	Entered	Ву
		\checkmark	Comme	nts
			Custom	er ID
			Site ID	
		\checkmark	Leak Ch	eck
			Printed	
			Open W	ork Order

5. The search screen can be also filtered, exported and printed like a report. Click on the Advanced Filter icon (magnifying glass) and select/enter specific filters. Click the same icon to add more filters.

0	I little a Fratar V		filtana and diamle	
О.	HILLING ENTER N	ev to addiv the	filters and displa	iv the results.

Countries and														
Open Recalculate Prices Export Prices Export Quantities Least Cost Rousing Print Tickets Retriesh Export +														
Consumption Steel Open Call Entries Hiork Order Leak/Gas Check Rind all the Toms														
SE View Q, Fiber Records (F2) 2 records)														X Clear All Filters
X Requested Date v Between v 1/1/2017 III and 1/31/2017 III														
X Order Status v Contains v Generated														
Location Customer Number Customer Name Site Number Description	Address	Driver	Order Status	Priority	Call in Date	Requested Date 🔻 Dispatch Date	Product	Percent Left	Quantity	Price	Total	Eccared By	Commerces	Lask Check
0001 - Fort Wayne 1005233 Customer A 0001 Tank A	1234 West Main Street	Jet the Driver	Generated	0	1/5/2017	1/5/2917	Property	0.00	350	1.3500	472.50	i irelyadmin	sample order for tank A	
0001 - Port Wayne 1005254 Customer 8 0001 Tank 8	Princeton Avenue	Jeff the Driver	Generated	0	1/5/2017	1/5/2017	Property	0.00	400	1.3500	540.00	i relyedmin	sample order for customer B	

7. The results can be exported via Export button on the following format:

Export +	
Excel	
PDF	
Text	-
CSV	

8. Exporting the records will be downloaded from the browser. Opening the downloaded exported file will open another browser tab if PDF file while the rest opens on the specific applications available on your computer.

Check

Here's the sample exported records on different format:

PDF
Open Call Entries

Location	Customer Number	Outlotter Name	Site Number	Description	A00/655	Diver	Order Status	Printy	Call In Date	Recepted Date	Dispatch Date	Protect	PersentLet	Guerday	Price	Tess	Entered By	Connerts	Leak Check
		Oustomer A	0001	Tark A			Generated		01/05/2017	01/05/2017		Propane	0	360	1.35	472.5	kelyadmin	sample order for tank	Talse
0001 - Fort Wayse	1005234	Customer B	0001	Tark B	Princeton Avenue	Jeff the Driver	Generated		01105/2017	01/05/2017		Propane	0	400	1.35	543	kelyadmin	sample order for customer 0	False
																			15/2017. 4:20:54 PM
Filter by:																			100011,420,0474
Requested Date is gr Requested Date is let	eater than or equal to " to then or equal to "111	01/01/2017																	
Order Status containe																			

Text

Laction Conteme Name Contents Name Site Name - Description Adverse Name - Descri

csv

Open Call Entries iRely LLC create	ood: 1/b/2007, 5107-02 PM Open Call Entries	iRely U.C Created: 1/3/2017, 5/37/52 PM	Open Call Entries iRe	ly LLC Created 1/5/2027, 5137.52 PM
	Mest Main Street Jeff the DrivegGenerated	Call in Data Requested Data Digatch Data Product Product Aff 01/05/2017 01/05/2017 Propase 0,000.06 01/05/2017 01/05/2017 Propase 0,000.08	Quantity Mice Tetal Entered ByConnexett 550 0,001.5500 0,472.50 instantial cample on 400 0,003.5500 0,500.00 instantial cample on	derfortank A. FALSE
Filter by: Requested Date is greater than or equal to 61/01/2017, Requested Date is less t 01/31/2017, Order Status contains Generated	ss than or equal to Filter by: Requested Date is greater th 01/11/2017, Order Status contains Gen	an or equal to $01/01/2017,$ Requested Date is less than or equal to entited	Filter by: Requested Date is greater than or equal to 01, 01/31/2017, Order Status contains Generated	(01/2017, Requested Date is less than or equal to

9. Print the report.