

How Call Order Status is Updated

Call Order Status field automatically updates based on the following processes:

- **Creating a Call Entry**

When a call order is created, the call order status automatically displays '**Generated**' which means a call order has been generated.

The screenshot shows the 'Call Entry' tab in a software interface. The 'Order Status' field is highlighted with a red box and contains the text 'Generated'. Other fields include 'Percent Left' (20.265), 'Original % Left' (empty), 'Calc. Qty' (597), 'Driver' (JCJ), 'Product' (PROPANE - HOME USE), 'Substitute' (empty), 'Desired Qty' (0), 'Lock Price' (checkbox), 'Printed' (No), 'Requested Date' (6/22/2017), 'Priority' (empty), 'Reg Price' (1.210000), 'Leak Check' (checkbox), 'Comments' (empty), 'Total' (772.03), 'Entered By' (IRELYADMIN), 'Call in Date' (6/22/2017), 'Dispatched Date' (empty), and 'Ticket Assigned' (empty). The 'Actual Delivered Information' section at the bottom has fields for Date, Time, Qty, Price, and Total, all of which are empty.

- **Dispatching a Delivery**

When an order status is tagged as '**Dispatched**', it means that the order has been sent to the drivers.

The screenshot shows the 'Call Entry' tab. The 'Order Status' field is highlighted with a red box and contains the text 'Dispatched'. The 'Dispatched Date' field now contains the date '6/22/2017'. The 'Ticket Assigned' field now contains the text 'TMO-95945'. All other fields remain the same as in the previous screenshot.

- **Cancelling Dispatch**

The order status goes back from 'Dispatched' to '**Generated**' when the user cancel the dispatch for specific reason.

- **Send/Receive From Energy Trac**

When an order is created on Site and has been received in Energy Trac, the **Received** checkbox in Call Entry will have a check mark but order status will still be at 'Generated' state.

The screenshot shows the 'Call Entry' tab. The 'Order Status' field is 'Generated'. The 'Received' checkbox is checked with a red box. The 'Call in Date' field now contains the date '6/23/2017'. The 'Ticket Assigned' field now contains the text 'TMO-95947'. All other fields remain the same as in the previous screenshot.

After receiving the order in Energy Trac, the user will then create an invoice for the order. Once the invoice is created and saved, the order will be ready for delivery. To be able to send the status in TM Site that the order has been '**Delivered**', the Send/Receive button should be clicked or End of Shift process should done. Delivery details will also be displayed in the Actual Delivered Information section.

The screenshot shows the 'Call Entry' tab. The 'Order Status' field is highlighted with a red box and contains the text 'Delivered'. The 'Received' checkbox is checked. The 'Call in Date' field contains '6/23/2017'. The 'Dispatched Date' field is empty. The 'Ticket Assigned' field contains 'TMO-95947'. The 'Actual Delivered Information' section at the bottom now has data: Date (6/23/2017), Time (4:55 PM), Qty (1.00), Price (1.21), and Total (1.21).

In case there are undelivered orders, the following should be it's status:

- Open Order - '**Generated**'
- Dispatched Order - '**Dispatched**'
- Routed Order - '**Generated**'

Received option will be unchecked automatically if Received Date is null and status is 'Generated'.

- Least Cost Routing
- Cancelling Route

- **Portal Order**

When an order is created via **Customer Portal** and has a setup for approval, order status will be set to '**Pending Approval**'.

Order

Close

Order

Percent Left	40	Original % Left	40	Calc. Qty	400
Product	Propane	Desired Qty	50	Price	\$40.000000
Requested Date	3/21/2018			Total	27,000.00
Comments	Sample portal order			Terms	Net 30
Order Status	Pending Approval	Received	<input type="checkbox"/>	Call in Date	3/21/2018
				Dispatched Date	
				Entered By	jessica.real@irely.com
				Ticket Assigned	TMO-109

Actual Delivered Information

Date	Time	Qty	Price	Total
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If this is an emergency **run-out**, please call the office at 800-433-5724 and press 1 for after hours.

Orders are fulfilled within 3-5 business days depending based. An expedite fee may be incurred.

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2.01s

Waiting for Approval

Refresh

Once approved, order status will be back to 'Generated'.

Order - 1005552 Customer A

Save Dispatch Delete Customer Print Close

Order Approval

Percent Left	40	Original % Left	40	Calc. Qty	400	Driver	Jeff the Driver
Product	Propane	Substitute		Desired Qty	50	Lock Price	<input type="checkbox"/>
Requested Date	3/21/2018	Priority		Spcl Price	\$40.000000	Leak Check	<input type="checkbox"/>
Comments	Sample portal order			Total	27,000.00	Terms	
Order Status	Generated	Received	<input type="checkbox"/>	Call in Date	3/21/2018	Dispatched Date	
						Ticket Assigned	TMO-109

Actual Delivered Information

Date	Time	Qty	Price	Total
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Call Entry Details

Last Delivery	Fill Method	Will Call	Total Capacity	1,000
Forecast Run Out	Next Delivery DD	2,091	Estimated % Left	40
Route Sequence	Serial Number		Estimated Gallons Left	200
Instructions				
Comments				

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2.88s

Approved

Refresh