

How to Dispatch a Delivery

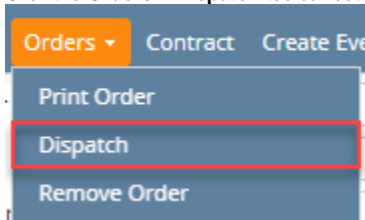
Preconditions:

- Email setup from System Manager > Company Configuration
- Dispatch file format setup from System Manager > Company Configuration > TM > Dispatch File Format setting

Here are the ways on how to dispatch delivery:

- **Via the Consumption Sites screen:**

1. [Open the Consumption Sites record](#) wherein the delivery needs to be dispatched. This means, that the site record has an active Call Entry.
2. Click the **Orders > Dispatch** toolbar button.

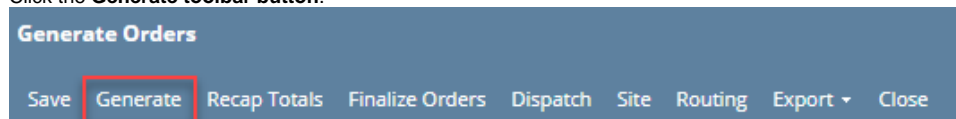


- **Via the Generate Orders screen:**

- a. On the Menu panel, click the **Generate Orders menu**. This will open the Generate Orders screen.
- b. Filter the records in the Detail tab using the fields in the **Selection Criteria panel**.

A screenshot of a web application interface. At the top, there's a 'Details' tab. Below it is a section titled 'Orders Detail' containing a 'Requested Date' field with the value '11/09/2018' and a calendar icon. Below this is a 'Selection Criteria' panel with a list of fields, each with a dropdown menu: 'Fill Method', 'Product', 'Location', 'Route', 'Driver', 'Clock Location', 'Est % Full', 'Next Degree Day', 'Next Julian Date' (with a calendar icon), 'Pending Orders' (set to 'Include'), 'On Hold' (set to 'Exclude'), 'Past Due' (set to 'Exclude'), 'Over Credit Limit' (set to 'Include'), and 'Budget Customers' (set to 'Include').

- c. Click the **Generate toolbar button**.



- d. Select the consumption site record in the grid, and then click the **Dispatch toolbar button**. Make sure that the selected site has an open call order.

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	

Here's what happens after the a delivery has been successfully dispatched.

- The **Dispatch toolbar button** will toggle to **Cancel Dispatch button**.
- The Order tab will be marked as '**Dispatched**'
- The date when the call in has been dispatched will display in **Dispatched Date** field.
- A file will be automatically exported based on Company Configuration > TM > Dispatch File Format setting. See [Exported File Via Digital Dispatcher](#) for file mapping.
- An **email** will be sent to the driver.

Consumption Sites - 0000000020

Customer: Meredith Grey, Address: 1611 Plummer Street, Los Angeles, CA 46815, Phone: (800) 100-200, Credit Limit: 0.000

Order Status: Dispatched, Received ☐ Call in Date: 11/09/2018, Dispatched Date: 11/09/2018, Ticket Assigned: TMO-150

- Via the **Consumption Sites** screen:

1. [Open the Consumption Sites record](#) wherein the delivery needs to be dispatched. This means, that the site record has an active Call Entry.
2. Click the **Orders > Dispatch** toolbar button.

Orders > Contract Create Event

Print Order

Dispatch

Remove Order

- Via the **Generate Orders** screen:

- a. On the Menu panel, click the **Generate Orders** menu. This will open the Generate Orders screen.

- b. Filter the records in the Detail tab using the fields in the **Selection Criteria** panel.

- c. Click the **Generate** toolbar button.

- d. Select the consumption site record in the grid, and then click the **Dispatch** toolbar button. Make sure that the selected site has an open call order.

Here's what happens after the a delivery has been successfully dispatched.

- The **Dispatch** toolbar button will toggle to **Cancel Dispatch**.
- The Call Entry tab will be marked as '**Dispatched**'
- The date when the call in has been dispatched will display in **Dispatched Date** field.
- An email will be sent to the driver.

- Via the **Consumption Sites** screen:

1. **Open the Consumption Sites record** wherein the delivery needs to be dispatched. This means, that the site record has an active Call Entry.

2. Click the **Dispatch** toolbar button.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry Remove 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 Detail tab using the fields in the **Selection Criteria** panel.

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: 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 Close

4. Select the consumption site record in the grid, and then click the **Dispatch** toolbar button. Make sure that the selected site has an open

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:

Grid

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
0001005078	Custom...	0001	Tank B	654 Da...	0001 - Port...	001-NW	000...	Pro...	0.00	400	500.00	0.00	0.00	0.00	0.00

call entry.

Here's what happens after the a delivery has been successfully dispatched.

- The **Dispatch** toolbar button will toggle to **Cancel Dispatch** button.
- The Call Entry tab will be marked as **'Dispatched'**
- The date when the call in has been dispatched will display in **Dispatched Date** field.

- An email will be sent to the driver.

The screenshot shows the 'Consumption Sites - 0001005078' window. The 'Call Entry' tab is active, and the 'Dispatch' button is highlighted with a red box. The 'Dispatched Date' field is also highlighted with a red box, showing '04/25/2016'. The 'Order Status' is 'Dispatched'.

- Via the Consumption Sites screen:

1. Open the Consumption Sites record wherein the delivery needs to be dispatched. This means, that the site record has an active Call Entry.
2. Click the Dispatch toolbar button.

This is another screenshot of the 'Consumption Sites - 0001005078' window, showing the 'Dispatch' button highlighted in red. The 'Dispatched Date' field is also highlighted with a red box, showing '04/25/2016'.

- Via the Delivery Dispatching screen:

1. On the Menu panel, click the Dispatch Deliveries menu. This will open the Delivery Dispatching screen.
2. Filter the records in the grid using the fields in the Selection Criteria panel.

The screenshot shows the 'Selection Criteria' panel in the 'Delivery Dispatching' screen. It includes fields for Bulk Plant Location, Next Degree Day, Dispatched Driver ID, and various filters like 'Will Calls' and 'Dispatched Calls'.

3. Click the Search toolbar button.

The screenshot shows the 'Delivery Dispatching' screen with the 'Search' button highlighted in red. Other buttons like 'Consumption Site', 'Dispatch', 'Cancel Dispatch', 'Change Driver', and 'Close' are also visible.

4. Select the consumption site record in the grid, and then click the Dispatch toolbar button.

This screenshot shows the 'Delivery Dispatching' screen with the 'Dispatch' button highlighted in red. Below the 'Selection Criteria' panel, there is a table with columns for Customer, Consumption Site, Item, Site Description, Clock Locat..., Requested Date, Dispatch Date, Driver ID, Driver Name, Desired Qty, Price, Total, and Est Run Out. The first row is selected.

Here's what happens after the a delivery has been successfully dispatched.

- The Dispatch toolbar button will toggle to Cancel Dispatch button.
- The Call Entry tab will be marked as 'Dispatched'
- The date when the call in has been dispatched will display in Dispatched Date field.

- An email will be sent to the driver.

Consumption Sites - 0001005078

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

Customer: Customer A Customer No: 0001005078 Current: 0.00 Credit Note:

Address: 1234 Main St. Fort Wayne, IN 46801 Terms: Due on Receipt Total Past Due: 0.00

Phone: 1000000000 Regular Credit: 0.00 Budget Amt Due: 35.10

Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 2 Consumption Site

Site Detail Devices Associated Sites Appliances **Call Entry** Delivery History Event History Work Orders Audit Log (54)

Percent Left: 80.00 Calculated Qty: 0 Desired Qty: 0.00 Driver: Customer C

Product: Propane Substitute: Spcl Price: 1.3000 Lock Price: Printed: No

Requested Date: 04/25/2016 Priority: Total: 0.00 Terms: Due on Receipt

Comments:

Order Status: Dispatched Call in Date: 04/25/2016 Dispatched Date: 04/25/2016 Entered By: irelyadmin

Ticket Assigned: TMO-45

Actual Delivered Information

Date: Time: Qty: Price: Total:

- Via the Consumption Sites screen:

1. Open the Consumption Sites record wherein the delivery needs to be dispatched. This means, that the site record has an active Call Entry.
2. Click the Dispatch toolbar button.

Consumption Sites - 0000000021

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

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note:

Address: GREEN ROAD CHISAGO CITY, MN 55013 Terms: 20 - COD Total Past Due: 0.000000

Phone: 1000000000 Regular Credit: 0.000000 Budget Amt Due: 0.000000

Credit Limit: 1.000000 Prepaid Balance: 0.000000

- Via the Delivery Dispatching screen:

1. On the Menu panel, double click the Dispatch Deliveries menu. This will open the Delivery Dispatching screen.
2. Filter the records in the grid using the fields in the Selection Criteria panel.

Delivery Dispatching

Selection Criteria

Condition From To Condition From To

Bulk Plant Location: Route ID:

Next Degree Day: 0 0 Requested Date:

Dispatched Driver ID: Item:

Include: ☐ Will Calls ☐ Dispatched Calls

Search Consumption Site **Dispatch** Cancel Dispatch Change Driver Close

3. Click the Search toolbar button.

Delivery Dispatching

Search Consumption Site Dispatch Cancel Dispatch Change Driver Close

4. Select the consumption site record in the grid, and then click the Dispatch toolbar button.

Delivery Dispatching

Search Consumption Site **Dispatch** Cancel Dispatch Change Driver Close

Here's what happens after the a delivery has been successfully dispatched.

- The Dispatch toolbar button will toggle to Cancel Dispatch button.
- The Call Entry tab will be marked as 'Dispatched'
- The date when the call in has been dispatched will display in Dispatched Date field.
- An email will be sent to the driver.

Consumption Sites - 0000000021

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

Customer: SHELL PROPANE Customer No: 0000000021 Current: 0.000000 Credit Note:

Address: GREEN ROAD CHISAGO CITY, MN 55013 Terms: 20 - COD Total Past Due: 0.000000

Phone: 1000000000 Regular Credit: 0.000000 Budget Amt Due: 0.000000

Credit Limit: 1.000000 Prepaid Balance: 0.000000

Showing 1 Consumption Site

Site Detail Devices Associated Sites Appliances **Call Entry** Delivery History Event History Work Orders

Percent Left: 0.000000 Calculated Qty: 0.000000 Desired Qty: Driver: Company

Product: PROPANE Substitute: Reg Price: 1.8490 Printed: No

Requested Date: 06/24/2015 Priority: Total: 0.000000

Comments: this is a sample dispatched call entry.

Order Status: Dispatched Call in Date: 06/24/2015 Dispatched Date: 06/24/2015 Entered By: AGADMIN

Ticket Assigned: TMO-4

- Via the **Consumption Sites** screen:

1. Open the **Consumption Sites** record wherein the delivery needs to be dispatched. This means, that the site record has an active Call Entry.
2. Click the **Dispatch** toolbar button.

The screenshot shows the 'Consumption Sites - 0000000021' window. The toolbar at the top contains buttons for New, Save, Search, Undo, Attach Device, Site Action, Print Call Entry, Call Entry, **Dispatch** (highlighted with a red box), Contract, Create Event, Summary List, Work Order, Print Efficiency, and Close. Below the toolbar, customer information is displayed: Customer: SHELL PROPANE, Address: GREEN ROAD, CHISAGO CITY, MN 55080, Phone: 1000000000. Financial details include Current: 0.00, Total Past Due: 0.00, Budget Amt Due: 0.00, Prepaid Balance: 0.00, and Credit Limit: 1.00.

- Via the **Delivery Dispatching** screen:

1. On the Menu panel, double click the **Dispatch Deliveries** menu. This will open the Delivery Dispatching screen.
2. Filter the records in the grid using the fields in the **Selection Criteria** panel. By default, From and To fields are disabled and will be enabled once a condition has been selected/set.

The screenshot shows the 'Selection Criteria' panel in the 'Delivery Dispatching' window. It contains two sets of filters. The first set includes Bulk Plant Location, Next Degree Day, and Dispatched Driver ID. The second set includes Route ID, Requested Date, and Item. There are also checkboxes for 'Will Calls' and 'Dispatched Calls'.

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

The screenshot shows the 'Delivery Dispatching' window's toolbar. It contains buttons for Search (highlighted with a red box), Consumption Site, Dispatch, and Cancel Dispatch.

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

The screenshot shows the 'Delivery Dispatching' window's toolbar. It contains buttons for Search, Consumption Site, **Dispatch** (highlighted with a red box), and Cancel Dispatch.

Here's what happens after the a delivery has been successfully dispatched.

- The **Dispatch** toolbar button will toggle to **Cancel Dispatch** button.
- The Call Entry tab will be marked as '**Dispatched**'
- An **email** will be sent to the driver.

The screenshot shows the 'Consumption Sites - 0000000021' window after a successful dispatch. The toolbar now shows 'Cancel Dispatch' instead of 'Dispatch'. The 'Call Entry' tab is highlighted and marked as 'Dispatched' (indicated by a red box). The 'Delivery History' tab is also visible. The grid shows one consumption site record: GREEN ROAD, Site 1. The details panel shows the site's status as 'Dispatched' and the driver as 'Company'.