

How to Put a Delivery On Hold

This feature can be used to put a delivery to a certain consumption site on hold for various reasons and for a specific date range. For a newly created consumption site, **On Hold Information** section fields are disabled by default.

- 1. Open a Consumption Sites record.
- 2. On the **Site tab > On Hold Information** panel, select the **On Hold checkbox** button. This will enable the other On Hold Information fields.
- 3. Enter other on hold details like **Reason**, **On Hold Start** date, and **On Hold End** date. You can also select the **Hold DD Calc** if needed.

Hold/Lost Customer Information

On Hold

☒

Hold DD Calc

☐

Reason

06 VACATION FOR WINTER

On Hold Start

2/1/2018

End

2/28/2018

Lost

☐

Reason

- 4. **Save** the changes in the Consumption Sites record.
The on hold site will show a red tag on the **Order tab** if there is an open order and an auto-generated event will be displayed on the **Event History** tab.

Order

Percent Left

71.915964

Original % Left

Calc. Qty

65

Driver

COMPANY

Product

PROPANE - HOME USE

Substitute

Desired Qty

0

Lock Price

☐

Printed

No

Requested Date

1/25/2018

Priority

Reg Price

1.999000

Leak Check

☐

Comments

Total

129.94

Terms

30TH NEXT MONTH

Order Status

Generated

Received

☐

Call in Date

1/25/2018

Dispatched Date

Ticket Assigned

Consumption Site currently On Hold starting 02/01/2018 through 02/28/2018 for 06 VACATION FOR WINTER.

Actual Delivered Information

Date

Time

Qty

Price

Total

Site

Detail

Devices

Associated Sites

Appliances

Order

Deliveries

Events

Work Orders(0)

Attachment (0)

Audit Log

Q Open

X Remove

Report

View

Filter (F3)

Date

Type

Description

User ID

Serial No.

1/25/2018

Consumption Site Put ...

Consumption Site Put On Hold - 06 VACATION FOR WINTER

IRELYADMIN

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On Hold Information

On Hold:

☒

Hold DD Calc:

☒

Reason

Failed Leak Test

On Hold Start:

01/01/2016

End:

06/01/2016

4. **Save** the changes in the Consumption Sites record.

The on hold site will show a red tag on the **Call Entry** tab and an auto-generated event will be displayed on the **Event History** tab.

The screenshot shows the 'Consumption Sites' record interface. The 'Call Entry' tab is active, displaying fields for 'Percent Left', 'Product' (Propane), 'Requested Date', 'Comments', 'Order Status', 'Call in Date', 'Dispatched Date', 'Calculated Qty', 'Desired Qty', 'Price', 'Lock Price', 'Printed', 'Terms', 'Entered By', and 'Ticket Assigned'. A red tag indicates the site is 'On Hold starting 04/27/2016 through 06/01/2016 for Failed Leak Test.' Below this, the 'Actual Delivered Information' section is visible. The 'Event History' tab is also shown, displaying a table with columns 'Date', 'Type', 'Description', 'User ID', and 'Serial No.'. A single event is listed: '04/27/2016 Consumption Site Put On Hold Consumption Site Put On Hold - Failed Leak Test irelyadmin'.

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2. On the **Site** tab > **On Hold Information** panel, select the **On Hold** checkbox button. This will enable the other On Hold Information fields.

3. Enter other on hold details like **Reason**, **On Hold Start** date, and **On Hold End** date. You can also deselect the **Hold DD Calc** if needed.

The screenshot shows the 'On Hold Information' panel. It includes fields for 'On Hold' (checked), 'Hold DD Calc' (checked), 'Reason' (Seasonal Usage), 'On Hold Start' (01/01/2016), and 'On Hold End' (01/31/2016).

4. **Save** the changes in the Consumption Sites record.

The on hold site will show a red tag on the **Call Entry** tab and an auto-generated event will be displayed on the **Event History** tab.

The screenshot shows the 'Consumption Sites' record interface. The 'Call Entry' tab is active, displaying fields for 'Percent Left', 'Product' (Propane), 'Requested Date', 'Comments', 'Order Status', 'Call in Date', 'Dispatched Date', 'Calculated Qty', 'Desired Qty', 'Price', 'Lock Price', 'Printed', 'Terms', 'Entered By', and 'Ticket Assigned'. A red tag indicates the site is 'On Hold starting 01/26/2016 through 01/31/2016 for Seasonal Usage.' Below this, the 'Actual Delivered Information' section is visible. The 'Event History' tab is also shown, displaying a table with columns 'Date', 'Type', 'Description', 'User ID', and 'Serial No.'. A single event is listed: '01/26/2016 Consumption Site Put On Hold Consumption Site Put On Hold - Seasonal Usage irelyadmin'.

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1. **Open a Consumption Sites record.**

2. On the **Site** tab > **On Hold Information** panel, select the **On Hold** checkbox button. This will enable the other On Hold Information fields.

- Enter other on hold details like **Reason**, **On Hold Start** date, and **On Hold End** date. You can also deselect the **Hold DD Calc** if needed.

On Hold Information

On Hold: ☒ Hold DD Calc: ☒

Reason: 26 TANK REPAIR NEEDED

On Hold Start: 06/15/2015 End: 06/30/2015

- Save the changes in the Consumption Sites record.

The on hold site will show a red tag on the Call Entry tab and an auto-generated event will be displayed on the Event History tab.

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

Percent Left: Calculated Qty: Desired Qty: Driver:
 Product: PROPANE Substitute: Price: Printed:
 Requested Date: Priority: Total:
 Comments: Entered By:
 Order Status: Call in Date: Dispatched Date: Ticket Assigned:

Consumption Site currently On Hold starting 06/15/2015 through 06/30/2015 for 26 TANK REPAIR NEEDED.

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

View Remove Layout Filter Records (F3)

Date	Type	Description	User ID	Serial No.
06/15/2015	Event-018	Consumption Site Put On Hold - 26 TANK REPAIR NEEDED	AGADMIN	

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- Enter other on hold details like **Reason**, **On Hold Start** date, and **On Hold End** date. You can also deselect the **Hold DD Calc** if needed.

On Hold Information

On Hold: ☒ Hold DD Calc: ☒

Reason: 26 TANK REPAIR NEEDED

On Hold Start: 06/06/2014 End: 06/30/2014

- Save the changes in the Consumption Sites record.

The on hold site will show a red tag on the Call Entry tab and an auto-generated event will be displayed on the Event History tab.

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

Percent Left: Calculated Qty: Desired Qty: Driver:
 Product: CONTRACT FEE Substitute: Price: Terms:
 Requested Date: Priority: Total: Printed:
 Comments: Call in Date: Entered By:
 Consumption Site currently On Hold starting 06/06/2014 through 06/30/2014 for 26 TANK REPAIR NEEDED.

Call Entry Details

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

View Remove Filter:

Date	Type	Description	User ID	Serial No.
06/06/2014	Event-018	Consumption Site Put On Hold - 26 TANK REPAIR NEEDED	AGADMIN	