

How to Put a Delivery Off Hold

The following are ways on how to put the delivery off hold:

- **By deselecting the On Hold checkbox button:**

1. [Open a Consumption Sites record](#) wherein the delivery is currently on hold.
2. On the **Site tab > On Hold Information panel**, deselect the **On Hold checkbox button**. This will disable and blank out the other On Hold Information fields.

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

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

The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site Detail Devices Associated Sites Appliances Order Deliveries Events Work Orders(0) Attachment (0) Audit Log (3)				
Q Open	X Remove	Report	View	Filter (F3)
Date	Type	Description	User ID	Serial No.
1/25/2018	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - Site has been manually taken off-hold.	IRELYADMIN	

- **By creating a Call Entry:**

1. [Open a Consumption Sites record](#) wherein the delivery is currently on hold.
2. Click the **Order toolbar button > Add Order button**. A confirmation message will prompt.

Consumption Sites - 0001005078

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

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

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

Phone: 1000000000 Regular Credit: 0.00 Budget Amt Due: 32.50

Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders Attachment (0) Audit Log (21)

Percent Left: 0.00

Product: Tank A

Requested Date: 1/25/2018

Comments:

Order Status: Consumption Site

Actual Delivered: 0.00

Date: 1/25/2018

Call Entry Details

Last Delivery: 0.00

Forecast Run Out: 80.00

Route Sequence: 001-NW Serial Number: 256.00

Instructions:

Comments:

Driver: 0.00

Lock Price: 0.00 Printed: 0.00

Terms: 0.00

Entered By: 0.00

Ticket Assigned: 0.00

Matched Date: 0.00

Total: 0.00

Capacity: 0.00

Estimated % Left: 80.00

Estimated Gallons Left: 256.00

Save

Page 1 of 1

3. Select **Yes** on the confirmation message.

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

The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site Detail Devices Associated Sites Appliances Order Deliveries Events Work Orders(0) Attachment (0) Audit Log (3)				
Q Open	X Remove	Report	View	Filter (F3)
Date	Type	Description	User ID	Serial No.
1/25/2018	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - Call Entry has been created.	IRELYADMIN	

- **By waiting for the On Hold End date to pass:**

Say the consumption site record has the following on hold details.

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

Once the system date had gone greater than the On Hold End date e.g. 02/28/2018, this delivery will be automatically taken off hold. Thus, when you open this record the On Hold Information details is cleared out, and the auto-generated event is also displayed on the Event History tab.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (24)
Q	Open	X	Remove	Layout	Q	Filter Records (F3)				
Date	Type	Description	User ID	Serial No.						
04/28/2016	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - On hold date has been expired.	irelyadmin							

The following are ways on how to put the delivery off hold:

- **By deselecting the On Hold checkbox button:**

1. Open a Consumption Sites record wherein the delivery is currently on hold.
2. On the **Site** tab > **On Hold Information** panel, deselect the **On Hold checkbox** button. This will disable and blank out the other On Hold Information fields.

On Hold Information

On Hold: ☒ Hold DD Calc: ☒

Reason Failed Leak Test

On Hold Start: 01/01/2016 End: 06/01/2016

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

The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (20)
Q	Open	X	Remove	Layout	Q	Filter Records (F3)				
Date	Type	Description	User ID	Serial No.						
04/27/2016	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - Site has been manually taken off-hold.	irelyadmin							

- **By creating a Call Entry:**

1. Open a Consumption Sites record wherein the delivery is currently on hold.
2. Click the create **Call Entry** toolbar button. A confirmation message will prompt.

Consumption Sites - 0001005078

New Save Search Undo Attach Device Site Action Print Call Entry **Add Call Entry** 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: 32.50

Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

+ Q Filter Records (F3)

Address Description

1234 Main St. Tank A

Percent Left:

Product:

Requested Date:

Comments:

Order Status:

Consumption Site Actual Delivered

Date:

Call Entry Details

Last Delivery:

Forecast Run Out:

Route Sequence: 001-NW Serial Number:

Instructions:

Comments:

Driver:

Lock Price: Printed:

Terms:

Entered By:

Ticket Assigned:

atched Date:

Total:

al Capacity: 0.00

imated % Left: 80.00

Estimated Gallons Left: 256.00

Site is currently on hold. Do you want to continue with creating Call Entry?

Yes No

Page 1 of 1

3. Select **Yes** on the confirmation message.
4. **Save** the changes in the Consumption Sites record.

The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (23)
<div> <input type="text"/> Open <input type="text"/> Remove <input type="text"/> Layout <input type="text"/> Filter Records (F3) </div>										
Date	Type	Description	User ID	Serial No.						
04/27/2016	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - Call Entry has been created.	irelyadmin							

- **By waiting for the On Hold End date to pass:**
Say the consumption site record has the following on hold details.

On Hold Information

On Hold: ☒ Hold DD Calc: ☒

Reason:

On Hold Start: End:

Once the system date had gone greater than the On Hold End date e.g. 04/27/2016, this delivery will be automatically taken off hold. Thus, when you open this record the On Hold Information details is cleared out, and the auto-generated event is also displayed on the Event History tab.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (24)
<div> <input type="text"/> Open <input type="text"/> Remove <input type="text"/> Layout <input type="text"/> Filter Records (F3) </div>										
Date	Type	Description	User ID	Serial No.						
04/28/2016	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - On hold date has been expired.	irelyadmin							

The following are ways on how to put the delivery off hold:

- **By deselecting the On Hold checkbox button:**
 1. [Open a Consumption Sites record](#) wherein the delivery is currently on hold.
 2. On the **Site tab > On Hold Information panel**, deselect the **On Hold checkbox button**. This will disable and blank out the other On Hold Information fields.

On Hold Information

On Hold: ☒ Hold DD Calc: ☒

Reason:

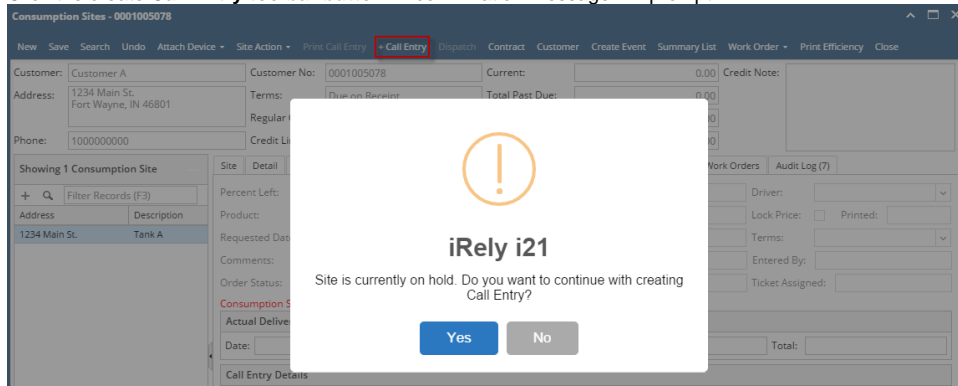
On Hold Start: End:

3. **Save** the changes in the Consumption Sites record.
- The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (4)
<div> <input type="text"/> Open <input type="text"/> Remove <input type="text"/> Layout <input type="text"/> Filter Records (F3) </div>										
Date	Type	Description	User ID	Serial No.						
01/26/2016	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - Site has been manually taken off-hold.	irelyadmin							

- **By creating a Call Entry:**
 1. [Open a Consumption Sites record](#) wherein the delivery is currently on hold.

- Click the create **Call Entry** toolbar button. A confirmation message will prompt.



- Select **Yes** on the confirmation message.
- Save** the changes in the Consumption Sites record.

The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Audit Log (8)
<div><div><div>Q</div><div>Open</div></div><div><div>×</div><div>Remove</div></div><div><div>⌵</div><div>Layout</div></div><div><div>Q</div><div>Filter Records (F3)</div></div></div>									
Date	Type	Description					User ID	Serial No.	
01/26/2016	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - Call Entry has been created.					irelyadmin		

- By waiting for the On Hold End date to pass:
Say the consumption site record has the following on hold details.

On Hold Information

On Hold: ☒ Hold DD Calc: ☒

Reason: Seasonal Usage

On Hold Start: 01/01/2016 End: 01/31/2016

Once the system date had gone greater than the On Hold End date e.g. 01/31/2016, this delivery will be automatically taken off hold. Thus, when you open this record the On Hold Information details is cleared out, and the auto-generated event is also displayed on the Event History tab.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Audit Log (9)
<div><div><div>Q</div><div>Open</div></div><div><div>X</div><div>Remove</div></div><div><div>Layout</div></div><div><div>Q</div><div>Filter Records (F3)</div></div></div>									
Date	Type	Description					User ID	Serial No.	
02/01/2016	Consumption Site Taken Off Hold	Consumption Site Taken Off Hold - On hold date has been expired.					irelyadmin		

- By deselecting the On Hold checkbox button:
 - Open a [Consumption Sites record](#) wherein the delivery is currently on hold.
 - On the **Site** tab > **On Hold Information** panel, deselect the **On Hold** checkbox button. This will disable and blank out the other On Hold Information fields.

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 auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site					Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
<div><div><div><div><div><div></div></div><div>View</div></div><div><div></div><div>Remove</div></div><div><div></div><div>Layout</div></div></div><div><div></div><div>Filter Records (F3)</div></div></div></div>												
Date	Type	Description						User ID		Serial No.		
06/15/2015	Event-017	Consumption Site Taken Off Hold - Site has been manually taken off-hold.						AGADMIN				

- **By creating a Call Entry:**

1. Open a [Consumption Sites](#) record wherein the delivery is currently on hold.
2. Click the create **Call Entry** toolbar button. A confirmation message will prompt.

Consumption Sites - 0000000021

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

Filter Records (F3)

Address Description

GREEN ROAD Site 1

Percent Left: iRely i21

Product:

Requested Date:

Comments:

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.

3. Select **Yes** on the confirmation message.
 4. **Save** the changes in the Consumption Sites record.
- The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

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-017	Consumption Site Taken Off Hold - Call Entry has been created.	AGADMIN					

- **By waiting for the On Hold End date to pass:**

Say the consumption site record has the following on hold details.

On Hold Information

On Hold: ☒ Hold DD Calc: ☒

Reason: 26 TANK REPAIR NEEDED

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

Once the system date had gone greater than the On Hold End date e.g. 06/06/2014, this delivery will be automatically taken off hold. Thus, when you open this record the On Hold Information details is cleared out, and the auto-generated event is also displayed on the Event History tab.

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.				
07/01/2015	Event-017	Consumption Site Taken Off Hold - On hold date has been expired.	AGADMIN					

- **By deselecting the On Hold checkbox button:**

1. Open a [Consumption Sites](#) record wherein the delivery is currently on hold.
2. On the **Site** tab > **On Hold Information** panel, deselect the **On Hold** checkbox button. This will disable and blank out the other On Hold Information fields.

On Hold Information

On Hold: ☐ Hold DD Calc: ☒

Reason: 26 TANK REPAIR NEEDED

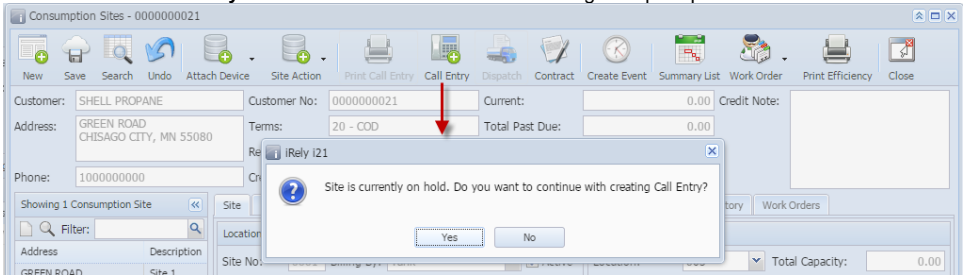
On Hold Start: 06/06/2014 End: 06/30/2014

3. **Save** the changes in the Consumption Sites record.
- The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Delete Filter								
Date	Type	Description	User ID	Serial No.				
06/06/2014	Event-017	Consumption Site Taken Off Hold - Site has been manually taken off-hold.	AGADMIN					

• **By creating a Call Entry:**

1. **Open a Consumption Sites record** wherein the delivery is currently on hold.
2. Click the create **Call Entry toolbar button**. A confirmation message will prompt.



3. Select **Yes** on the confirmation message.
 4. **Save** the changes in the Consumption Sites record.
- The auto-generated event will be displayed on Event History tab. This event will also specify how the site was taken off hold.

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders				
View Delete Filter: <input type="text"/>				
Date	Type	Description	User ID	Serial No.
06/06/2014	Event-017	Consumption Site Taken Off Hold - Call Entry has been created.	AGADMIN	

• **By waiting for the On Hold End date to pass:**

Say the consumption site record has the following on hold details.

On Hold Information

On Hold: ☒

Hold DD Calc: ☒

Reason:

26 TANK REPAIR NEEDED

...

On Hold Start:

06/06/2014

End:

06/30/2014

Once the system date had gone greater than the On Hold End date e.g. 06/06/2014, this delivery will be automatically taken off hold. Thus, when you open this record the On Hold Information details is cleared out, and the auto-generated event is also displayed on the Event History tab.

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders				
View Delete Filter: <input type="text"/>				
Date	Type	Description	User ID	Serial No.
06/05/2014	Event-017	Consumption Site Taken Off Hold - On hold date has been expired.	AGADMIN	