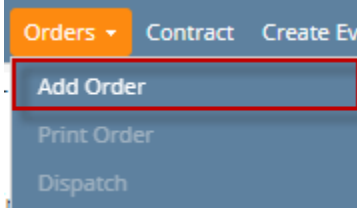


How to Create a Call Order

1. Open the [Consumption Sites record](#) where you want to create the Call Order.
2. Click the **Orders drop down** button and select **Add Order** button. This will display a separate Order screen. Note that the Order toolbar button is visible only when the **Billing By** of the site is set to Tank.

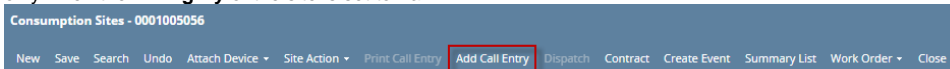


- If the consumption site's delivery is currently on hold, instead of directly creating the order, it will show a confirmation message. Refer to no.2 of [How to Put Delivery Off Hold](#).
 - If the consumption site has an active Contract, the Add Order button will, first, open the **Search Contract screen**. In this case, select the appropriate Contract in the grid and then click the **Open toolbar button**. The order will be created upon closing the **Search Contract screen**.
 - If the consumption site **Sales Tax** option is checked, Total field will be computed based on the State Tax ID assigned. See [Sales Tax and Special Pricing](#)
 - If customer has a Special Price, it will be auto computed in Order's Price field. See [Sales Tax and Special Pricing](#)
3. Verify the order details. Most of the fields are auto-populated, however you can still change the percent, requested date, desired qty, driver and terms value and enter comments if necessary.
 4. Save the changes in the Consumption Sites record by clicking **Save** button.
 5. Saving the Order screen and will enable the **Dispatch** and **Print Order** button.



These fields are not editable – Product, Calculated Qty, Printed, Order Status, Call in Date, Dispatched Date, Entered By, and the fields in Actual Delivered Information and Call Entry Details panel.

1. Open the [Consumption Sites record](#) where you want to create the Call Entry.
2. Click the **Add Call Entry toolbar button**. This will show a progress message that informs the user that a call entry is being created. This toolbar button will also navigate you to the **Order tab** and will enable Print Call Entry and Dispatch button. Note that the Call Entry toolbar button is visible only when the **Billing By** of the site is set to Tank.



- If the consumption site's delivery is currently on hold, instead of directly creating the call entry it will show a confirmation message. Refer to no.2 of [How to Put Delivery Off Hold](#).
 - If the consumption site has an active Contract, the Call Entry button will, first, open the **Search Contract screen**. In this case, select the appropriate Contract in the grid and then click the **Open Selected toolbar button**. The call entry will be created upon closing the **Search Contract screen**.
 - If the consumption site **Sales Tax** option is checked, Total field will be computed based on the State Tax ID assigned. See [Sales Tax and Special Pricing](#)
 - If customer has a Special Price, it will be auto computed in Call Entry's Price field. See [Sales Tax and Special Pricing](#)
3. Verify the call entry details. Most of the fields are auto-populated, however you can still change the percent, requested date, desired qty, driver and terms value and enter comments if necessary.
 4. Save the changes in the Consumption Sites record by clicking **Save** button.



These fields are not editable – Product, Calculated Qty, Printed, Order Status, Call in Date, Dispatched Date, Entered By, and the fields in Actual Delivered Information and Call Entry Details panel.

1. Open the [Consumption Sites record](#) where you want to create the Call Entry.

- Click the **Add Call Entry** toolbar button. This will show a progress message that informs the user that a call entry is being created. This toolbar button will also navigate you to the **Call Entry** tab and will enable Print Call Entry and Dispatch button. Note that the Call Entry toolbar button is visible only when the **Billing By** of the site is set to Tank.

The screenshot shows the 'Consumption Sites - 0001005079' window. The 'Add Call Entry' button is highlighted in the toolbar. A progress dialog box titled 'Creating Call Entry..' is displayed in the center of the screen. The window contains various tabs and fields for site information, including Customer, Address, Phone, Terms, and Billing By.

- If the consumption site's delivery is currently on hold, instead of directly creating the call entry it will show a confirmation message. Refer to no.2 of [How to Put Delivery Off Hold](#).
 - If the consumption site has an active Contract, the Call Entry button will, first, open the **Search Contract** screen. In this case, select the appropriate Contract in the grid and then click the **Open Selected** toolbar button. The call entry will be created upon closing the **Search Contract** screen.
 - If the consumption site **Sales Tax** option is checked, Total field will be computed based on the State Tax ID assigned. See [Sales Tax and Special Pricing](#)
 - If customer has a Special Price, it will be auto computed in Call Entry's Price field. See [Sales Tax and Special Pricing](#)
- Verify the call entry details. Most of the fields are auto-populated, however you can still change the value and enter comments if necessary.

The screenshot shows the 'Consumption Sites - 0001005079' window with the 'Call Entry' tab selected. The 'Call Entry' section displays various details including Percent Left (42.00), Calculated Qty (380), Desired Qty (0.00), Product (Propane), Reg Price (1.2990), Lock Price (0.00), Requested Date (04/27/2016), Priority, Total (493.62), Terms (Net 30), Entered By (irelyadmin), and Ticket Assigned. The 'Actual Delivered Information' and 'Call Entry Details' sections are also visible.

- Save the changes in the Consumption Sites record.



These fields are not editable – Product, Calculated Qty, Printed, Order Status, Call in Date, Dispatched Date, Entered By, and the fields in Actual Delivered Information and Call Entry Details panel.