

How to Create a Portal Order

Pre-Requisite: Customer should have a portal access to Tank Management. See [How to Setup Customer Portal](#).

There are 2 ways to create a Portal Order:

1. Via My Tanks screen
2. Via Request Order. See [How to Request and Pay an Order](#).

Here's the steps on how to create a portal order via My Tanks screen.

1. Login to Customer Portal.
2. From **Tank Management > My Tanks**, open a specific site. Ensure that there is no existing order for the site. Portal Orders can be only removed by regular users.

My Tanks

Request Order Close

Customer	Customer A	Customer No	1005552
Address	Fort Wayne Avenue Indianapolis, IN 46204	Terms	3 - Net 30
Phone	(317) 261-7000	Regular Credit	0.00
		Credit Limit	0.00

3. The Order screen will display.
4. Enter the **Desired Qty** value. It should not be less than the Minimum Order Quantity value set from System Manager > Company Configuration. **Portal message** is also displayed at the bottom part of the screen.

Order

Submit Close

Order

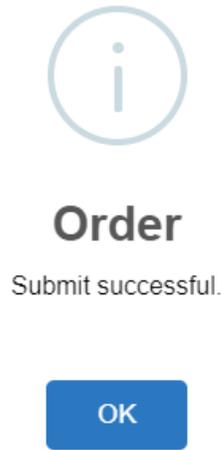
Percent Left	40	Original % Left	0	Calc. Qty	400
Product	Propane	Desired Qty	50	Price	540,000,000
Requested Date	3/21/2018	Total			27,000.00
Comments	Sample portal order			Terms	Net 30
Order Status	Pending Approval	Received	<input type="checkbox"/>	Call in Date	3/21/2018
		Dispatched Date		Entered By	jessica.real@irely.com
		Ticket Assigned			

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.

5. Click the **Submit button**. Once successful, the message below will display.



The order will be submitted and will be displayed in the grid. If portal order needs approval, status will be **'Pending Approval'**, else **'Generated'**. Order screen status bar will also display **'Pending for Approval'** for orders that needs approval and **'No Need for Approval'** if approval is not necessary.

Status	Call In Date	Requested Date	Dispatched Date	Qty	Price	Total	Driver	Printed	Entered By
Pending Approval	3/21/2018	3/21/2018		400.00	540.00	27,000.00	Jeff the Driver	<input type="checkbox"/>	Jessica.Real@ir...

Status	Call In Date	Requested Date	Dispatched Date	Qty	Price	Total	Driver	Printed
Generated	3/21/2018	3/21/2018		400.00	540.00	27,000.00	Jeff the Driver	<input type="checkbox"/>

A notification email will be also sent to the customer's email address.



Your Order has been received and is being reviewed. You will be contacted by our staff shortly with additional information.

iRely LLC

800-433-5724

6. The same order details will be displayed when accessed by a regular user.

Consumption Sites - 1005552

New Save Search Undo Attach Device Site Action Orders Contract Create Event Summary List Work Order Close

Customer Customer A Customer No 1005552 Current 0.00 Email jessica.real@irely.com

Address Fort Wayne Avenue Indianapolis, IN 46204 Terms 3 - Net 30 Total Past Due 135.00 Credit Note

Phone (317) 261-7000 Regular Credit 0.00 Budget Amt Due 0.00

Credit Limit 0.00 Prepaid Balance 0.00

Showing 1 Consumption S... Site Detail Devices Associated Sites Order Appliances Deliveries Events Work Orders(0) Attachment Audit Log

Percent Left 40 Original % Left 40 Calc. Qty 400 Driver Jeff the Driver

Product Propane Substitute Desired Qty 50 Lock Price Printed No

Requested Date 03/21/2018 Priority Spcl Price 540,000,000 Leak Check

Comments Sample portal order Total 27,000.00 Terms Net 30

Entered By jessica.real@irely.com

Order Status Pending Approv. Received Call in Date 03/21/2018 Dispatched Date Ticket Assigned TMO-109

Actual Delivered Information

Date	Time	Qty	Price	Total

Call Entry Details

Last Delivery 10/24/2017 Fill Method Will Call Total Capacity 1,000

Forecast Run Out 11/21/2018 Next Delivery DD 2,091 Estimated % Left 40

Route Sequence 001-NW Serial Number 1057439 Estimated Gallons Left 200

Instructions Comments

1.09% Ready Page 1 of 1 Refresh