

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.

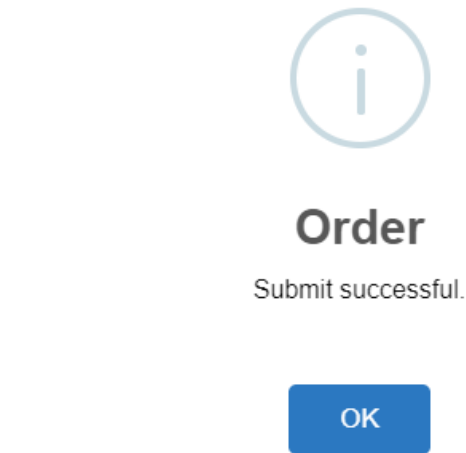
1. Login to Customer Portal.
2. From **Tank Management > My Tanks**, open a specific site. Ensure that there is no existing order for the site. Portal Orders can be only removed by regular users.

The screenshot shows the 'My Tanks' interface. At the top, there is a blue header bar with the text 'My Tanks'. Below this, there is a white bar containing a red-outlined button labeled 'Request Order' and a 'Close' link. The main area of the screen is a form with several fields: '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), and '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.

The screenshot shows the 'Order' screen. At the top, there is a blue header bar with the text 'Order'. Below this, there is a white bar containing a 'Submit' button and a 'Close' link. The main area of the screen is a form with several fields: 'Percent Left' (40), 'Original % Left' (0), 'Calc. Qty' (400), 'Product' (Propane), 'Desired Qty' (50), 'Price' (540.000000), 'Requested Date' (3/21/2018), 'Total' (27,000.00), 'Comments' (Sample portal order), 'Terms' (Net 30), 'Entered By' (jessica.real@irely.com), 'Order Status' (Pending Approval), 'Received' (checkbox), 'Call in Date' (3/21/2018), 'Dispatched Date', and 'Ticket Assigned'. At the bottom, there is a section titled 'Actual Delivered Information' with fields for 'Date', 'Time', 'Qty', 'Price', and 'Total'. A red-outlined box at the bottom of the screen contains the following text: '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.

Summary

Devices

Appliances

Order

Deliveries

Open

Export

View

Filter (F3)

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...

Summary

Devices

Appliances

Order

Deliveries

Open

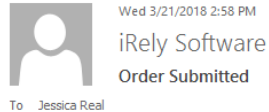
Export

View

Filter (F3)

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

NewSaveSearchUndoAttach DeviceSite ActionOrdersContractCreate EventSummary ListWork OrderClose

CustomerCustomer ACustomer No1005552Current0.00Emailjessica.real@irely.com

AddressFort Wayne AvenueIndianapolis, IN 46204

Terms3 - Net 30Total Past Due135.00Credit Note

Regular Credit0.00Budget Amt Due0.00

Phone(317) 261-7000Credit Limit0.00Prepaid Balance0.00

Showing 1 Consumption S...

QExportFilter (F3)

Address*Description*

Fort Wayne AvenueSite A

SiteDetailDevicesAssociated SitesOrderAppliancesDeliveriesEventsWork Orders(0)AttachmentAudit Log

Percent Left40Original % Left40Calc. Qty400DriverJeff the Driver

ProductPropaneSubstituteDesired Qty50Lock PricePrintedNo

Requested Date03/21/2018PrioritySpcl Price540.000000Leak Check

CommentsSample portal orderTotal27,000.00TermsNet 30Entered Byjessica.real@irely.com

Order StatusPending ApprovalReceivedCall in Date03/21/2018Dispatched DateTicket AssignedTMO-109

Actual Delivered Information

DateTimeQtyPriceTotal

Call Entry Details

Last Delivery10/24/2017Fill MethodWill CallTotal Capacity1,000

Forecast Run Out11/21/2018Next Delivery DD2,091Estimated % Left40

Route Sequence001-NWSerial Number1057439Estimated Gallons Left200

InstructionsComments

1.00%ReadyPage1 of 1Refresh