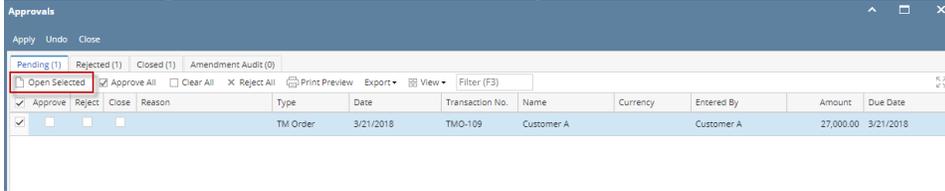


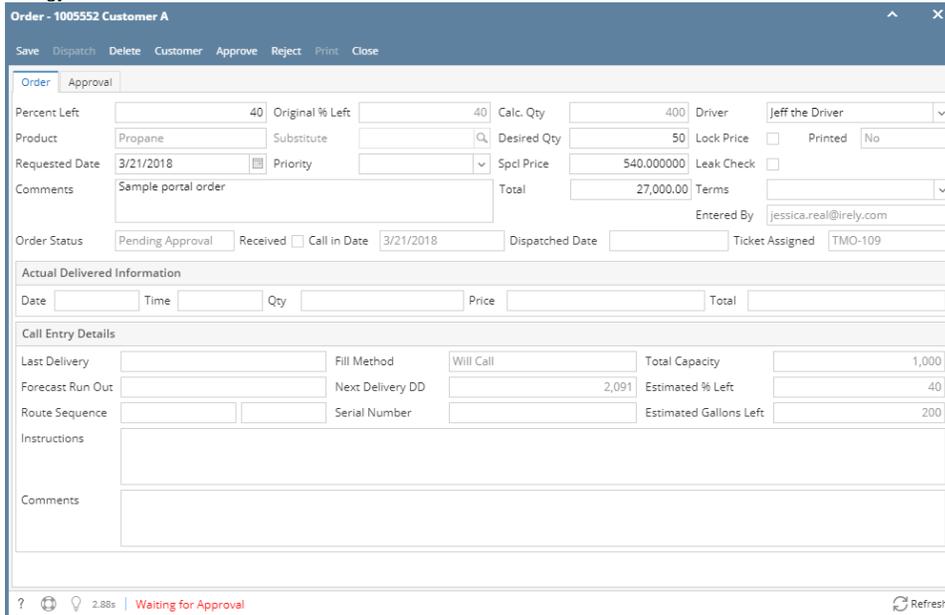
How to Approve/Reject a Portal Order

Here's how to Approve or Reject a Portal Order:

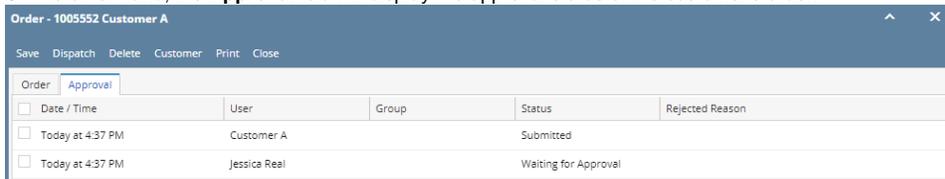
1. Login as Regular User or as the Approver.
2. From Common Info, click the **Approval** menu. This will display the Approvals screen.
3. Under the **Pending** tab, select the TM Order and click the **Open Selected** button.



4. The **Order** screen for the specific customer will display. Orders with Pending Approvals cannot be printed, dispatched, routed or received into Energy Trac.



On the other hand, the **Approval** tab will display the approval status of the customer's order.



5. To **Approve** the order, click the **Approve button**. The message will be displayed.



Order

Approve successful.



After approval, the following will take place:

- Order will be removed from Approval > Pending Tab. It will be displayed under **Approved tab**.
- **Dispatch** and **Print** button will be available.
- Order Status will be '**Generated**'.
- Order screen status will be '**Approved**'.

Order - 1005552 Customer A

Save Dispatch Delete Customer Print Close

Order Approval

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: 3/21/2018 Priority: [] Spcl Price: 540.000000 Leak Check: []

Comments: Sample portal order Total: 27,000.00 Terms: []

Entered By: jessica.real@irely.com

Order Status: **Generated** Received: [] Call in Date: 3/21/2018 Dispatched Date: [] Ticket Assigned: TMO-109

Actual Delivered Information

Date: [] Time: [] Qty: [] Price: [] Total: []

Call Entry Details

Last Delivery: [] Fill Method: Will Call Total Capacity: 1,000

Forecast Run Out: [] Next Delivery DD: 2,091 Estimated % Left: 40

Route Sequence: [] Serial Number: [] Estimated Gallons Left: 200

Instructions: []

Comments: []

? 2.88s **Approved** Refresh

- An email notification to customer will be sent containing the order details.



Your Order has been accepted and is ready to be scheduled for delivery.

Site: 0001 - Site A

Requested Date: 3/21/2018

Product: Propane

Quantity: 50

Price: 540.0000

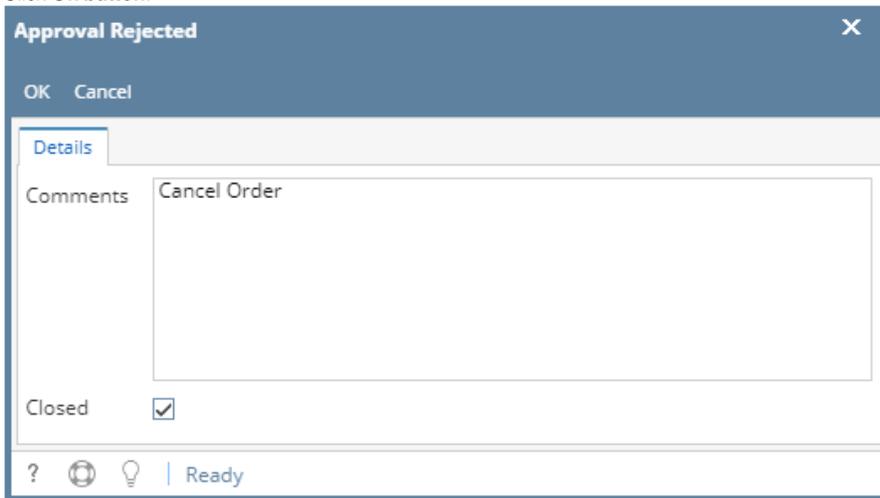
Tax: 0.00

Total: 27000.00

iRely LLC

800-433-5724

6. To **Reject** the order, click the **Reject button**. The screen below will display. Enter the reason in **Comments box** why the order will be rejected. Click **Ok button**.



The message that the Order has been rejected successfully will display.



Order

Reject successful.



After rejection, the following will take place:

- Portal Order will be automatically deleted.
- An email notification to customer will be sent to customer.



Wed 3/21/2018 5:47 PM

iRely Software

Order Cancelled

To Jessica Real

Your order has been cancelled. You will be contacted by our staff shortly with additional information.

iRely LLC

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