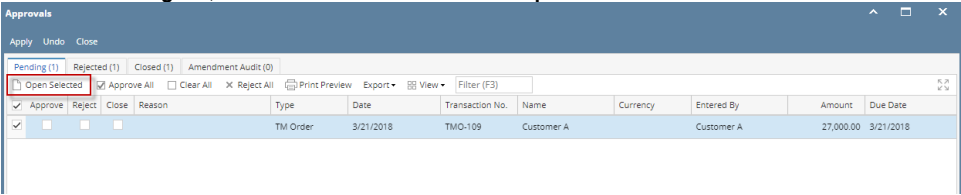


# How to Approve/Reject a Portal Order

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.

The screenshot shows the 'Order - 1005552 Customer A' screen. The 'Approval' tab is selected. The order details are as follows:

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: Terms: Total: 27,000.00

Comments: Sample portal order

Order Status: Pending Approval 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:

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

The screenshot shows the 'Order - 1005552 Customer A' screen with the 'Approval' tab selected. The table displays the approval status of the order:

Date / Time	User	Group	Status	Rejected Reason
Today at 4:37 PM	Customer A		Submitted	
Today at 4:37 PM	Jessica Real		Waiting for Approval	

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



## Order

Approve successful.

OK

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 Scl 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

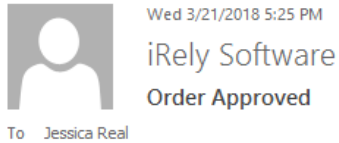
Route Sequence Serial Number Estimated Gallons Left 200

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**.

A screenshot of a software dialog box titled "Approval Rejected" with a close button (X) in the top right corner. Below the title bar, there are "OK" and "Cancel" buttons. The main area of the dialog has a tab labeled "Details". Below the tab is a "Comments" label followed by a large text input field containing the text "Cancel Order". At the bottom left of the dialog, there is a "Closed" label and a checked checkbox. The bottom of the dialog features a status bar with icons for help, settings, and a lightbulb, followed by the word "Ready".

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



## Order

Reject successful.

OK

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

800-433-5724