

On Hold Detail

The report does no longer exist in 16.3 and higher version. **Customer On Hold Details** however can be viewed via Consumption Site Search screen.

Here is how to use and preview consumption site on hold details from search screen.

- 1. From Tank Management menu, open Consumption Site Search screen
- 2. Consumption Site Search screen will display. On Hold fields are hidden by default in **Consumption Site > Site tab**.

Consumption Sites										
New Open Refresh Export +										
Consumption Sites Open Call Entries Work Order Leak/Gas Check Find all the Toms										
View Filter Records (F3) 37 record(s)										
Customer No	Customer Name	Description	Phone	Address	City	Location	Billing By	Serial Number	Fill Method	Active
<input type="checkbox"/> 1005235	Customer A	Tank A	(100) 100-1111	1234 Main Street	Brookville	0001 - Fort Wa...	Tank	SN1234	Will Call	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1005236	Customer B	Tank B	(222) 222-1000	Rosemont	Middleburg	0001 - Fort Wa...	Tank	SN5678	Keep Full	<input checked="" type="checkbox"/>
<input type="checkbox"/>										

- 3. Right click on the column header and check the On Hold fields you want to view on search grid. Other fields may be also selected if you want to view a more detailed record. Click **Apply** button.

Customer No ▼ Cor ▼ Apply X Cancel Filter Columns

Customer No Customer Name

Sort Ascending

Sort Descending

Filter

Group By

Group By with Totals

Clear Group By

Columns

Hide Column

☐ Item No.

☐ Last Delivery

☐ Next Delivery

☐ Estimated % Full

☐ Email Address

☐ Customer ID

☐ Site ID

☒ On Hold

☒ Hold Reason

☒ Hold Start

☒ Hold End

☐ Fill Group

- 4. Once the columns are selected, it will be displayed on the grid as well as the customer's on hold details.

Consumption Sites										
Close										
Consumption Sites Open Orders Work Order Leak/Gas Check Inactive Sites Find all the Toms										
Open Selected New Export Columns View Reassign Driver										
Customer No Contains 0000000020 Add Filter										
Customer No	Customer Name	Description	Phone	Address	City	Location	Billing By	Serial Number	Fill Method	On Hold
<input type="checkbox"/> 0000000020	Meredith Gray	Test Site	(800) 100-200	1811 Plummer Street	Los Angeles	0001-Fort Wayne	Tank	tan001	Keep Full	<input checked="" type="checkbox"/>
									Hold Reason	Hold Start
									Failed Leak Test	01/09/2019
									Hold End	01/01/2019

- 5. Search grid display can also be filtered by clicking the **Advanced Filter icon**. Add the column in the combo box and select the specific filter you want the grid to display.

Consumption Sites

Close

Consumption Sites Open Orders Work Order Leak/Gas Check Inactive Sites Find all the Toms

Open Selected New Export Columns View Reassign Driver

On Hold

▼

Equals

▼

Yes

▼

+ Add Filter

- 6. Customer site on hold details can be also exported and printed through the **Export** button. It can be exported in the following format shown below:

Export

Column

CSV (Comma Delimited)

Text (Tab Delimited)

Excel

PDF

Note: Exporting the records will automatically download the file.

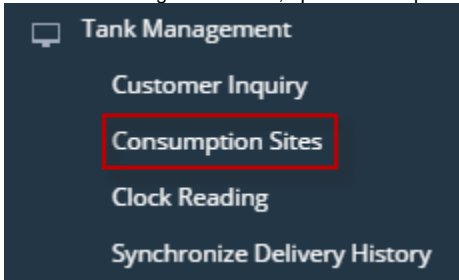
Here's the sample exported record in **PDF** format:

Consumption Sites

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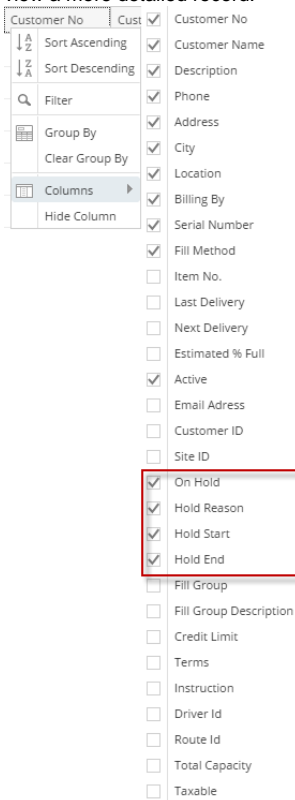
1. From Tank Management menu, open Consumption Site Search screen



2. Consumption Site Search screen will display. On Hold fields are hidden by default in **Consumption Site > Site tab**.

Consumption Sites												
New Open Refresh Export +												
Consumption Sites Open Call Entries Work Order Leak/Gas Check Find all the Tanks												
88 View	Filter Records (F3)	37 record(s)										
Customer No	Customer Name	Description	Phone	Address	City	Location	Billing By	Serial Number	Fill Method	Active		
<input type="checkbox"/> 1005235	Customer A	Tank A	(100) 100-1111	1234 Main Street	Brookville	0001 - Fort Wa...	Tank	SN1234	Will Call	<input checked="" type="checkbox"/>		
<input type="checkbox"/> 1005236	Customer B	Tank B	(222) 222-1000	Rosemont	Middleburg	0001 - Fort Wa...	Tank	SN5678	Keep Full	<input checked="" type="checkbox"/>		
<input type="checkbox"/>												

3. Right click on the column header and check the On Hold fields you want to view on search grid. Other fields may be also selected if you want to view a more detailed record.



4. Once the columns are selected, it will be displayed on the grid as well as the customer's on hold details.

Customer No	Customer Name	Description	Phone	Address	City	Location	Billing By	Serial Number	Fill Method	Active	On Hold	Hold Reason	Hold Start	Hold End
<input type="checkbox"/> 1005235	Customer A	Tank A	(100) 100-1111	1234 Main Street	Brookville	0001 - Fort Wa...	Tank	SN1234	Will Call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Failed Leak Test	1/22/2016	12/31/2016
<input type="checkbox"/> 1005236	Customer B	Tank B	(222) 222-1000	Rosemont	Middleburg	0001 - Fort Wa...	Tank	SN5678	Keep Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Credit Hold	1/1/2017	

- Search grid display can also be filtered by clicking the **Advanced Filter icon**. Add the column in the combo box and select the specific filter you want the grid to display.

View **Filter Records (F3)** 37 record(s)

Customer Name
Description
Phone
Address
City
Location
Billing By
Serial Number
Fill Method
Active
On Hold
Hold Reason
Hold Start
Hold End

Consumption Sites

New Open Refresh Export

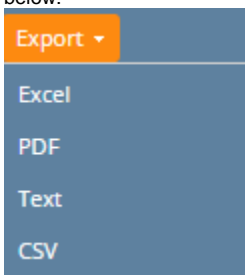
Consumption Sites Open Call Entries Work Order Leak Gas Check End all the Tools

View **Filter Records (F3)** 1 record(s) X Clear All Filters

X On Hold = Equals Yes
X Hold Reason = Contains Failed Leak Test

Customer No.	Customer Name	Description	Phone	Address	City	Location	Billing By	Serial Number	Fill Method	Active	On Hold	Hold Reason	Hold Start	Hold End
1005235	Customer A	Tank A	(100) 100-1111	1234 Main Street	Brookville	0001 - Fort Wayne Tank	SN1234	Wll Call	True	✓	✓	Failed Leak Test	12/22/2016	12/31/2016

- Customer site on hold details can be also exported and printed through the **Export button**. It can be exported in the following format shown below:



Note: Exporting the records will open a separate tab of the browser.

Here's the sample exported record in **CSV** format:

Consumption Sites

Customer No.	Customer Name	Description	Phone	Address	City	Location	Billing By	Serial Number	Fill Method	Active	On Hold	Hold Reason	Hold Start	Hold End
1005235	Customer A	Tank A	(100) 100-1111	1234 Main Street	Brookville	0001 - Fort Wayne Tank	SN1234	Wll Call	True	True	True	Failed Leak Test	12/22/2016	12/31/2016
1005236	Customer B	Tank B	(222) 222-1000	Rosemont	Middleburg	0001 - Fort Wayne Tank	SN5678	Keep Full	True	True	True	Credit Hold	01/01/2017	

Filter by
On Hold is equal to 'True'

12/22/2016, 4:51:28 PM

This report will show a list of all currently on hold consumption sites of all active customers only.

Here is how to use and preview this report.

- Open Reports Parameter screen of On Hold Detail.

2. Fill out report's parameter section.

Report Parameters - On Hold Detail

Preview Defaults Save Close

X Remove Layout Filter Records (F3)

Field Name	Condition	From	To	Join
<input type="checkbox"/> Location	Between			And
<input type="checkbox"/> Hold Reason	Equal To			And
<input type="checkbox"/> Hold End Date	Between			And
<input type="checkbox"/>				

Report Options

Description

Print Summary Only ☐

Sort Options

X Remove Filter:

Sort Field Name Sort Direction

Ascending

Ready

3. Select or deselect an option from the Report Options section.

- **Location** - You can select from the combo box list, or manually type one in. Use this to filter the report by consumption site's location number.
- **Hold Reason** - You can select from the combo box list, or manually type one in. This will filter the report based on the Reason stated on the Consumption Sites Site tab.
- **Hold End Date** - You can select a date from the date picker, or manually type one in. This is based on the date stated on In Hold End field on the Consumption Sites Site.

4. Click **Preview** toolbar button.

- **Print Summary Only** - When this option is not selected, the report will display the consumption sites and hold details. Otherwise, the report will show Location, On Hold Reason, and Report Total details only.

Preview Task List

X Remove Archive Layout Filter Records (F3)

Report Name	Status	Download	Details
<input type="checkbox"/> On Hold Detail			

- When 'Print Summary' option is deselected.

On Hold Detail

i21 Demo Setup Company(Source)

Monday, April 25, 2016
03:31:58 PM

Location	On Hold Reason	Customer Number	Customer Name	Site Number	On Hold Start	On Hold Through
0001 - Fort Wayne	Failed Leak Test					
		0001005079	Customer B	0001	04/25/2016	05/01/2016
Summary: 1						
0001 - Fort Wayne	Seasonal Usage					
		0001005078	Customer A	0001	04/25/2016	05/01/2016
Summary: 1						
0001 - Fort Wayne	2					
Summary:						
Report Total: 2						

- When 'Print Summary' option is selected.

On Hold Detail

i21 Demo Setup Company(Source)

Monday, April 25, 2016
03:33:41 PM

Location	On Hold Reason	Count
0001 - Fort Wayne	Failed Leak Test	1
0001 - Fort Wayne	Seasonal Usage	1
0001 - Fort Wayne Total:		2
Report Total:		2

This report will show a list of all currently on hold consumption sites of all active customers only.

Here is how to use and preview this report.

1. Open Reports Parameter screen of On Hold Detail.

2. Fill out report's parameter section.

Field Name	Condition	From	To	Join
<input type="checkbox"/> Location	Between			And
<input type="checkbox"/> Hold Reason	Equal To			And
<input type="checkbox"/> Hold End Date	Between			And

Sort Field Name	Sort Direction
	Ascending

3. Select or deselect an option from the Report Options section.

- **Location** - You can select from the combo box list, or manually type one in. Use this to filter the report by consumption site's location number.
- **Hold Reason** - You can select from the combo box list, or manually type one in. This will filter the report based on the Reason stated on the Consumption Sites Site tab.
- **Hold End Date** - You can select a date from the date picker, or manually type one in. This is based on the date stated on In Hold End field on the Consumption Sites Site.

4. Click **Preview** toolbar button.

- **Print Summary Only** - When this option is not selected, the report will display the consumption sites and hold details. Otherwise, the report will show Location, On Hold Reason, and Report Total details only.

Report Name	Status	Download	Details
On Hold Detail			

- When 'Print Summary' option is deselected.

Report Viewer

On Hold Detail

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On Hold Detail

Tuesday, March 24, 2015
11:59:40 AM

Location	On Hold Reason	Customer Number	Customer Name	Site Number	On Hold Start	On Hold Through
063	23 APPLIANCE INSPECTION NEEDED					
		0000000021	SHELL PROPANE	0001	03/24/2015	03/30/2015
Summary: 1						
063 Summary: 1						
071	05 INACTIVE					
		0000000010	UNIOIL PETROLEUM	0001	03/16/2015	03/30/2015
Summary: 1						
071 Summary: 1						
Report Total: 2						

- When 'Print Summary' option is selected.

Report Viewer

On Hold Detail

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On Hold Detail

Friday, September 12, 2014
03:42:38 AM

Location	On Hold Reason	Count
070	09 WILL CALL ONE TIME	1
070	10 LEAK TEST NEEDED	1
070 Total:		2
Report Total:		2