How to Send an Email to Driver for Dispatch Delivery

Here's how to use Delivery Dispatch with Email Notification to Driver

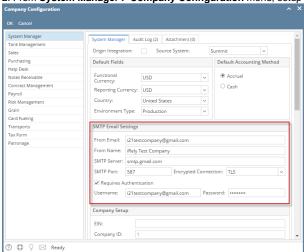
Via Consumption Site

1. Make sure that driver has a specific email and dispatch email is enabled in agslmst. This can be set under Salesperson Maintenance screen or in Sales > Customer Entity screen.

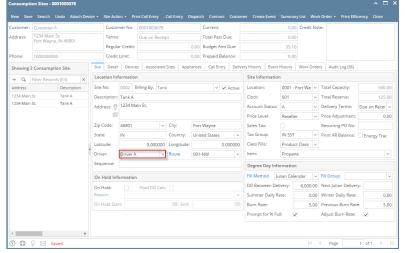




2. From System Manager > Company Configuration menu, setup the SMTP Email settings and provide the necessary details.

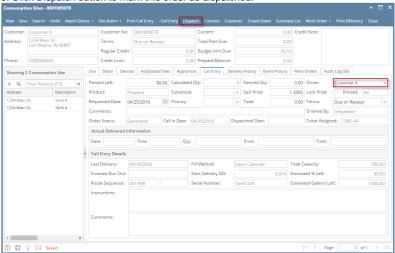


3. Open a site or create a new site and select a specific driver. I selected 'Company' as example.



4. Create a Call Entry. Notice that Dispatch button will be enabled. You can either select a new driver or use the same driver from site. Save.

5. Click Dispatch button to mark this order as dispatched.



6. After the will call order has been tagged as dispatched, the system will automatically send an email to the driver containing the details of the site and call entry.



Mon 4/25/2016 2:16 PM

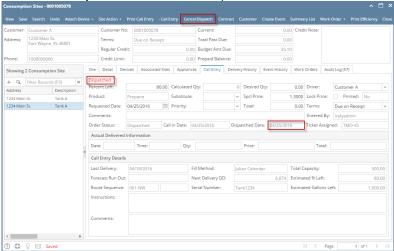
i21testcompany@gmail.com

Dispatch to Driver: Driver A

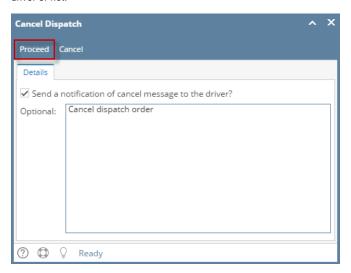
To Jessica Real

Account:	0001005078 Customer A				
Site No.:	0002				
Address:	1234 Main St.				
City:	Fort Wayne	State:	IN	ZipCode:	46801
Product:	LPG	Propane	9		
Serial Number:	Tank1234				
Capacity:	500.00				
Est. Percent Left:	80.00				
Clock:	001				
Quantity:	0.00				
Price:	\$ 1.3000				
Total Cost:	\$ 0.00				
Priority:					
Comment:	sample dispatch				
Dispatcher:	irelyadmin				
Dispatched:	4/25/2016 2:15:46 PM				
Instructions:					
Map Link:	1234 Main St.				

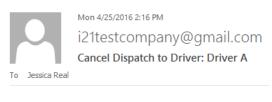
7. Click Cancel Dispatch button to cancel the dispatch.



8. Cancel Dispatch form will display. If you wish to notify the driver that dispatched will call order has been cancelled, you should check the option 'Send a notification of cancel message to the driver?' else the driver will not be notified. You can either enter a message to the driver or not.



9. Click the **Proceed button**. Call Entry will be untagged as dispatched. An email will be sent to the driver that contains information such as the original dispatch date and time and the period it has been cancelled and who cancelled it.



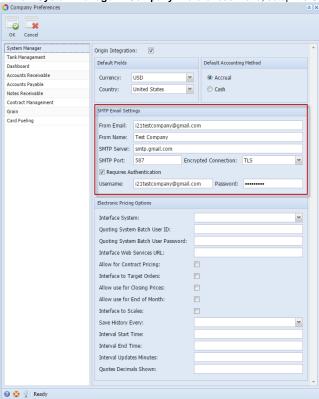
CANCEL Dispatch			
Account:	0001005078	Customer A	
Site No.:	0002		
Product:	LPG	Propane	
Date Cancelled:	4/25/2016	2:15:44 PM	
Cancelled By:	irelyadmin		
Original Dispatch:	4/25/2016	2:12:36 PM	
Cancel Message:	Cancel dispatch		

• Via Consumption Site

1. Make sure that driver has a specific email and dispatch email is enabled in agslmst. This can be set under Salesperson Maintenance screen.



2. From System Manager > Company Preferences menu, setup the SMTP Email settings and provide the necessary details.



3. Open a site or create a new site and select a specific driver. I selected 'Company' as example. Consumption Sites - 0000000021 7 Print Call Entry Call Entry Dispatch Contract Create Event Summary List Work Order Print Efficiency Site Action SHELL PROPANE 0.000000 Credit Note: Customer: Customer No: 0000000021 Current: GREEN ROAD Total Past Due: 0.000000 Address: CHISAGO CITY, MN 55013 Regular Credit: 0.000000 Budget Amt Due: 1000000000 1.000000 Prepaid Balance: 0.000000 Showing 1 Consumption Site Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders ○ Q ? Filter Records (F3) Location Information Site Information Address Description Site No: 0001 Billing By: Tank ✓ ✓ Active Location: 063 Total Capacity: GREEN ROAD Description: Site 1 Clock: C1 ▼ Total Reserve: Address: 🔠 GREEN ROAD Account Status: Price Reduction: 0.0000 Sales Tax: Class Fills: Product Class Y Zip Code: 55013 City: CHISAGO CITY Tax State ID: Recurring PO No: State: Country: United States Tax Locale 1: Print AR Balance: Energy Trac Tax Locale 2: Latitude: 0.000000 Longitude: 0.000000 Driver: Route: Q v Company 063 Sequence: Degree Day Information On Hold Information Fill Method: Will Call Sill Group: Q v DD Between Delivery: 0 Next Julian Delivery: Hold DD Calc: Summer Daily Rate: 0.000000 Winter Daily Rate: 0.000000

4. Create a Call Entry. Notice that Dispatch button will be enabled. You can either select a new driver or use the same driver from site. Save.

🕜 🧔 🧣 Saved

Burn Rate:

Prompt for % Full:

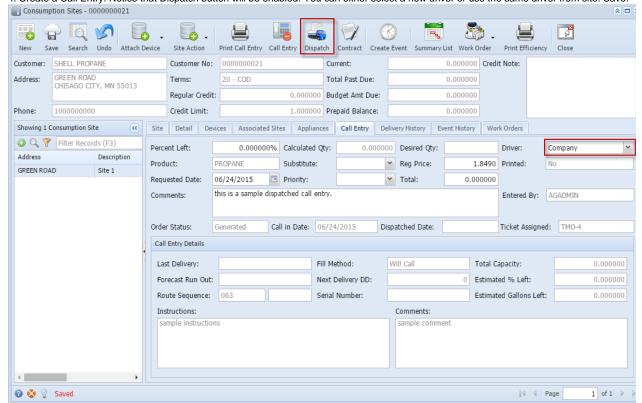
J

1.000000 Previous Burn Rate:

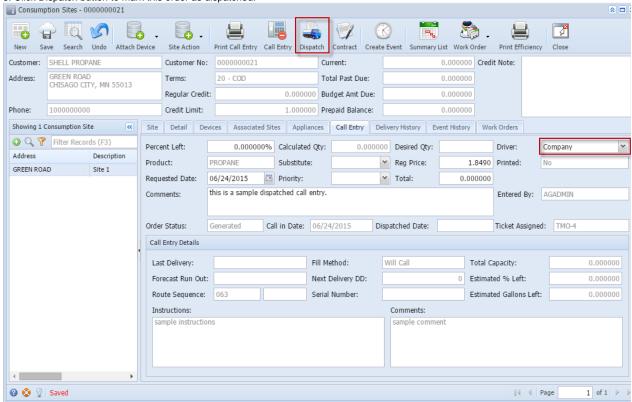
Adjust Burn Rate:

0.000000

1 of 1



5. Click Dispatch button to mark this order as dispatched.



6. After the will call order has been tagged as dispatched, the system will automatically send an email to the driver containing the details of the site and call entry.



Thu 6/25/2015 11:46 AM

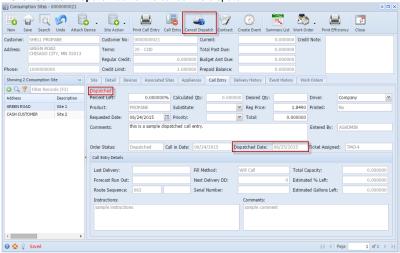
i21testcompany@gmail.com

Dispatch to Driver: Company

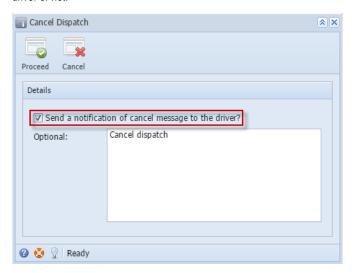
To Jessica

Account:	0000000021 SHELL PROPANE				
Site No.:	0001				
Address:	GREEN ROAD				
City:	CHISAGO CITY	State:	MN	ZipCode:	55013
Product:	1130	PROPANE			
Serial Number:					
Capacity:	0.00				
Est. Percent Left:	0.00				
Clock:	C1				
Quantity:	0.00				
Price:	\$ 1.8490				
Total Cost:	\$ 0.00				
Priority:					
Comment:	this is a sample dispatched call entry.				
Dispatcher:	AGADMIN				
Dispatched:	6/25/2015	11:45:3	32 AN	1	
Instructions:	sample instructions				
Map Link:	GREEN ROAD				

7. Click Cancel Dispatch button to cancel the dispatch.



8. Cancel Dispatch form will display. If you wish to notify the driver that dispatched will call order has been cancelled, you should check the option 'Send a notification of cancel message to the driver?' else the driver will not be notified. You can either enter a message to the driver or not.



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Cancel dispatch

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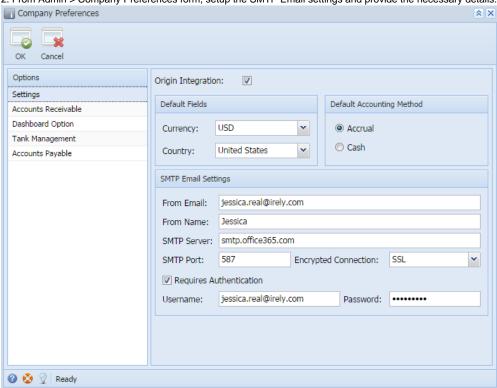
Cancel Message:

Via Consumption Site

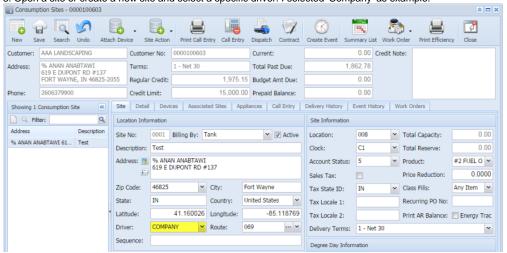
1. Make sure that driver has a specific email and dispatch email is enabled in agslmst. This can be set under Salesperson Maintenance screen

	agsls_email	agsls_dispatch_email	agsls_slsmn_id	agsls_name
4	NULL	N	CFN	CFN Card Sales
5	jessica.real@irely.com	Υ	CO	COMPANY
6	NULL	N	DAR	DAVE REICHHART

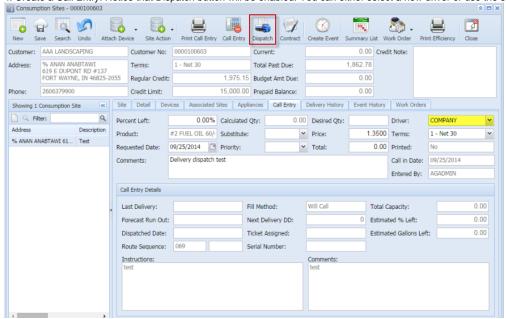
2. From Admin > Company Preferences form, setup the SMTP Email settings and provide the necessary details.



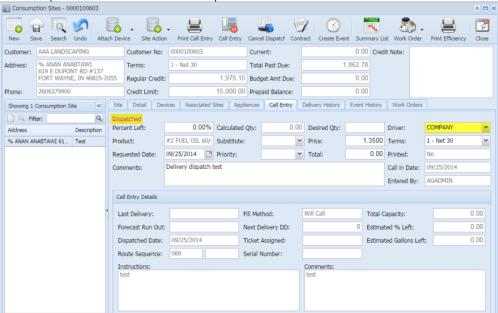
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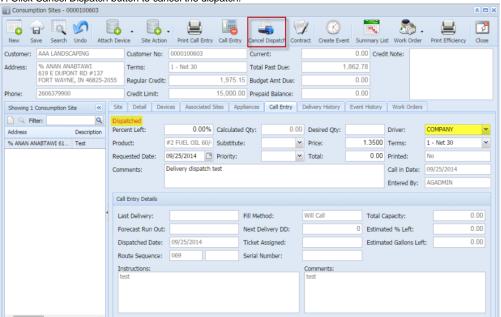
6. After the will call order has been tagged as dispatched, the system will automatically send an email to the driver containing the details of the site and call entry.

Dispatch to Driver: COMPANY

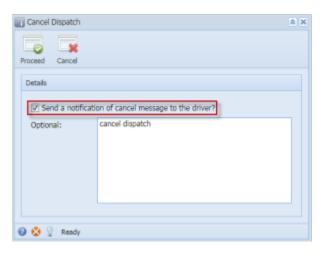
Jessica Real
Sent: Thu 09/25/2014 2:42 AM
To: Jessica Real

Account:	0000100603	AAA LANDSCAPING		
Address:	% ANAN ANABTAWI 619 E DUPONT RD #137			
Product:	PFO6040 #2 FUEL OIL 60/40			
Capacity:	0.00			
Clock:	C1			
Quantity:	0.00			
Price:	\$ 1.3500			
Total Cost:	\$ 0.00			
Comment:	Delivery dispatch test			
Dispatcher:	AGADMIN			
Dispatched:	9/25/2014	2:42:22 AM		
Instructions:	test			
Map Link:	% ANAN ANABTAWI			

7. Click Cancel Dispatch button to cancel the dispatch.



8. Cancel Dispatch form will display. If you wish to notify the driver that dispatched will call order has been cancelled, you should check the option 'Send a notification of cancel message to the driver?' else the driver will not be notified. You can either enter a message to the driver or not.



9. Click Proceed button. Call Entry will be untagged as dispatched. An email will be sent to the driver that contains information such as the original dispatch date and time and the period it has been cancelled and who cancelled it.

Cancel Dispatch to Driver: COMPANY

Cancel Message:



cancel dispatch