

Product Delivery Orders

Last Modified on 03/17/2022 9:17 am CDT

Product Delivery Orders may be marked to invoice directly or can create Energy Tickets. Energy Tickets are imported into Invoices. Inventory is affected at invoicing.

Add A Product Delivery Order

Split Call in date: 03/16/2022 Current Tank%: 52 Monitor %: 85 Call in order ID: 1142

Due date: 03/16/2022 Directions/Notes: Delivery Type: Scheduled

<Tank Serial #>: 250156

Tank size: 500

Description: Home Heat DeptID: Prop00

CustID: AdeJa Product name: Propane - Home Heating

Balance: -1949.80 K-Factor: 5.000

Customer: James Ade Heating usage factor: 2500.000

Route: North Auxiliary factor: 0

Region: East Last delivery date: 03/22/2019

Tank address: 2110 E 350 North Rd Delivery amount: 450

Tank city: Pana State: IL Zip: 62557

Deliver Options

Is this an out of gas call in order?

Fill percent %

of gallons Gal

Amt. of purchase \$

Charge price \$: 3.85 Gal

Amount needed: 0 Gal

Order Status

Open Complete

Dispatch Job Status

Ready

Times out of gas: 0 Print

Location: 00MAIN

<Product>: Propane - Home Heatir

Create Invoice

Truck Ticket:

Delivery Gauge:

Buttons: Bookings Save Cancel

E-Mail Drivers

	Driver ID	Email Destination	Format
1	<input checked="" type="checkbox"/> 678RT	test@email.com	Standard
2	<input type="checkbox"/> HAC3		Standard

- **Split** – The *Energy Billing* and *Rental Billing* split arrangements for this tank may be viewed at this screen.
- **Call in date** – Enter the date the order was placed.
- **Current Tank %** – This information defaults from tank information on *Scheduled Delivery* tanks.
- **Monitor %** – Select this option to use the Monitor percentage. The percentage is displayed below the heading.
Note: This option is available when a valid tank monitor reading is present.
- **Call in order ID** – This is automatically assigned by the program.
- **Delivery Type** – Choose *Will Call* or *Scheduled*, based on tank setup.
- **Due date** – Enter the date this delivery is due.
- **Tank Serial #** – This defaults from the tank information. If the tank selected was an incorrect tank, double-click and select the correct tank.
- **Directions / Notes** – The directions and notes from the tank display in this area.
- **Tank size** – This displays from the tank information.
- **Description** – This displays from the tank information.
- **CustID** – This displays from the tank information.

- **Balance** – This is the current Accounts Receivable balance for the customer. It includes Regular, Prepay, and Unapplied Cash, but not Budget Billing.
- **Customer** – This displays from the tank information.
- **Route** – This displays from the tank information.
- **Region** – This displays from the tank information.
- **Tank Address, City, State, Zip** – This displays from the tank information.
- **DeptID** – This is the Department ID for the fuel product set on the tank.
- **Product name** – This displays from the tank information.
- **K-Factor** – This is the number of heating degree days occurring for one gallon of fuel to be used. The formula for calculating the heating degree days is $65 - ((High\ temp - low\ temp) / 2)$.
- **Heating usage factor** – This displays the heating usage factor for the tank. This number is calculated by taking the K-Factor times the tank size.
- **Auxiliary factor** – This displays the amount of usage for minor products such as water heaters, clothes dryers, and ovens. Auxiliary factor is expressed in the number of gallons the non-heat appliances use in one day.
- **Last delivery date** – This displays from the tank information.
- **Delivery amount** – This is the number of gallons of the last delivery.
- **E-mail Drivers** – Optionally send drivers a copy of the Delivery Order via text message or email. If a driver is set on the tank, that driver defaults in as automatically selected. The message sent can either be a standard or an abbreviated version.
- **Deliver Options:**
 - **Is this an out of gas call in order?** – Agvance keeps a running total of how many times a customer calls with an empty tank. The number increases by one each time a Delivery Order is saved with this option selected. This number is shown both on the bottom right section of this screen in the *Times out of gas* area, and at *File / Open / Customers*.
 - **Fill percent** – If there is an amount in the *Current Tank %*, it uses that amount, *Tank Size*, and the *Fill percent* entered to calculate the *# of gallons needed*.
 - **# of gallons** – If a specific number of gallons was ordered, enter the number here.
 - **Amt. of purchase** – When a customer orders a specific dollar amount of fuel to be delivered, enter the dollar amount in this area. Agvance divides the dollar amount of the purchase by the purchase price per gallon to calculate the number of gallons needed.
 - **Charge price \$** – Enter the price the customer should be charged for this delivery. The list price product set on the tank defaults.
 - **Amount needed** – This amount calculates automatically as the information is completed in the above fields.
- **Order Status** – Orders are saved with an *Open* status. Invoicing the Energy Ticket changes the status to *Complete*. Tickets can manually be marked as *Complete*. Marking an order as *Complete* makes them unavailable

at the *Import Energy Tickets* screen.

- **Notes** – Immediately below the *Open* or *Complete* order status, there is an area where notes may optionally be entered for the driver.
- **Dispatch Job Status** – For users of the Dispatch module, the *Dispatch Job Status* may be set to give the dispatcher vision of the job.
- **Times out of gas** – This displays the number of times this tank has had an *Out of Gas* call.
- **Print** – Select this option to print the Product Delivery Order when saved.
- **Location** – Product Delivery Orders can be posted to a particular location. The *Delivery Order* screen can be filtered for one location or all locations.
- **Product** – The Product Delivery Order will not save without a product selected. This product carries through the Energy Ticket to the Invoice.
- **Create Invoice** – If this option is selected, on the save of the Product Delivery Order, tank history is updated for the fill and an Invoice is automatically created in Accounting.
- **Truck Ticket** – If creating the Invoice from the Product Delivery Order, the truck ticket number may be entered in this area.
- **Delivery Gauge** – If creating the Invoice from the Product Delivery Order, the post-delivery gauge reading may be entered.
- **Bookings** – If the customer has a Booking for the product set on the tank, **Bookings** displays in red. Tagging a Booking applies the price on the Booking to the Product Delivery Order and that price carries through when importing the Energy Ticket into an Invoice. The Invoice is automatically marked as booked.