

Enter Call-In Information

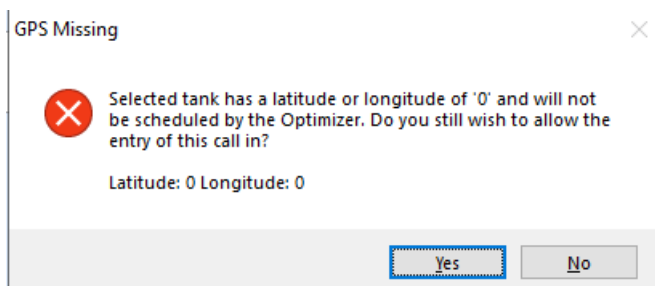
Last Modified on 04/10/2023 10:17 am EDT

1. From the *Master Menu*, select **Call In Entry** or, from any window, press **CTRL+W**.
2. Choose **Create**.

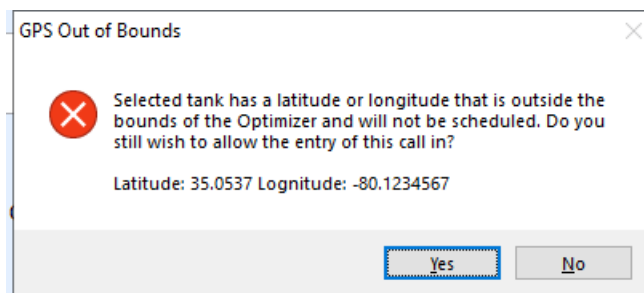
- a. To validate GPS coordinates on tanks when a call in entry is created, a new system setting is automatically created and defaults to *No*.
- b.

Category	Setting Name	Actual Value
Tank	Validate CallIn GPS	N

- c. When set to Y (yes) and a call in entry is created, the GPS coordinates are validated. The validation checks to ensure the tank has coordinates and will also check Optimizer customers to ensure coordinates are within Optimizer bounds. If there are no coordinates set on the tank, the user will get this warning message.



- d. For Optimizer users: When there are coordinates on a tank that are outside of the Optimizer bounds the user will receive the following warning that displays the coordinates on the tank.



If **No** is selected the call in entry will be removed. When **Yes** is selected the user can continue entering the call in. Validation will also happen when changing a pending call in entry from pending Yes to pending No.

3. Enter the *Customer # field* or press **F5** to choose from a list.

Customer #	Name	Pend	Div	Route Est %	Est Del Min Gal	Min Dollars	Scheduled	Imm Fill	Tck Pr
100007	ADAMS ANSEL	N	1	3 20	600 300	0.00	00/00/00	No	N

Map / Optimizer
Truck Run Sequence Scheduled

Comment Call In 2:23 pm Entered By SHANNON

Serial Number	P 646578P	house	Special Instr	Do not drive on lawn	Current	(771.19)	
Est Gals Left	990.00	99 %	Capacity	1000	Total Cap	1000	
Last Del Date	02/24/14	Bus Owns	Yes	Address	987 RONALD REGAN PARKWAY	30-Day	\$0.00
Customer Type	1 RESIDENTIAL					60-Day	\$0.00
Delivery Type	2 KEEP FULL				BROWNSBURG, IN 46112	90-Day	\$0.00
Terms Code	1 30 DAYS			Del Addr	987 RONALD REGAN PARKWAY	Total	(771.19)
Price Code	1 A	1.0000	Loc	1 AVON	BROWNSBURG, IN	Credit Limit	\$0.00

Hold Code 1 BAD CREDIT
Release Date 12/31/19

Call In History **Pndg Web Ordrs** **View All** Send Calc. Dlrs

Tickler

Start	End	Monthly Pymt Amt
04/01/14	07/31/14	\$1,337.82

Must pay in full by the end of July or will not be eligible for 2015 budget.

Save As Cancel

4. In the *Route* field, the route will automatically update from the route entered in the Tank Information for the customer but can be changed if necessary.
5. In the *Est %* box, enter the percentage left in the tank if different from the default.
6. In the *Min Gal* field, enter the minimum delivery if applicable.
7. In the *Imm Fill* field, enter *Yes* if the customer should be scheduled for an immediate delivery.
8. In the *Comment* area, enter any additional comments.
Note: This information is sent to Re-Engineered EnergyTrack handhelds and can also be printed on scheduling reports.
9. In the *Call In* field, enter the date the customer called.
10. If there is Call In History for this customer, the **Call In History** button will be highlighted.
11. If there is a Tickler for this customer, the **Tickler** button will be highlighted.
12. Choose **Save**.

Select **Calc. Dlrs** to display the window below:

Total Dollars to spend	<input type="text" value="\$250.00"/>
Dollars to spend	<input type="text" value="\$250.00"/>
All applied taxes (0.000%)	<input type="text" value="\$0.00"/>
Price per Gallon	<input type="text" value="2.0000"/>
Gallons to Deliver	<input type="text" value="125"/>

Calc Save and Close Cancel

Once a call in has been scheduled on the map or Optimizer Plus program, a yellow highlight will display routed tanks.

Customer #	Name	Pend	Div	Route	Est %	Est Del	Min Gal	Min Dollars	Scheduled	Imm Fill	Tck Pr
3804	CHEREP, KELLI		1	1	20	250	0	0.00	00/00/00	No	N
5413	ERNST, SCOTT		1	1	30	250	0	0.00	00/00/00	No	N
980596	FORNEY, ADAM		1	1	10	350	0	0.00	00/00/00	No	N
48366	DIEKMAN, PAUL	N	1	3	20	72	93	150.00	00/00/00	No	N
19244	RINGLER, ROBERT T		1	5	0	400	0	0.00	00/00/00	No	N
1569	BOHATY, KENNETH		1	5	52	280	0	0.00	00/00/00	No	N
491055	LOWDER, AMANDA J		1	5	0	250	0	0.00	00/00/00	No	N
8007	HEYEN ESTATE, BOYD		1	8	0	400	0	0.00	00/00/00	No	N
9349	LAWTON, LARRY		1	8	30	250	0	0.00	00/00/00	No	N
530580	MEYER, RICHARD GLENN		1	9	25	275	0	0.00	00/00/00	No	N

Map / Optimizer

Truck: 716 Run: 1 Sequence: 3 Scheduled: 05/10/22

Comment: Please del 250 gallons - check under the lid for payment \$1.945 402-416-3523 Call In: 05/09/22 8:09 am Entered By: Amanes

Serial Number: P 301917 HOME HEATING Special Instr: MUST BE DRY!!!! Current: \$0.00
 Est Gals Left: 290.10 29 % Capacity: 1000 Total Cap: 1000 Phone: (402)416-3523 30-Day: \$0.00
 Last Del Date: 12/08/21 Bus Owns: No 60-Day: \$0.00
 Customer Type: 1 RESIDENTIAL HOME HEAT ***PNC*** 90-Day: \$0.00
 Delivery Type: 1 CALL IN Total: \$0.00
 Terms Code: 2 Charge Del Addr: Credit Limit: \$0.00
 Price Code: 1 A 2.0470 Loc: 254 FIRTH LP
 TW-LP HEATING (CHARGE SALES TAX CALL IN)