Release order
Customer Guide
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Purpose

The purpose of this document is to describe the process of obtaining and processing a release order.

A release order is an authorization for a customer to load a given product at a given location. There is no guarantee that the product will be available nor is it a guarantee that a given carrier or driver will be allowed in the refinery.

The Carrier Selection is not intended to limit or restrict the use of a carrier. If the Carrier is not listed, it is to inform you that a carrier’s insurance waiver may have expired or needs to be updated.

Requirements

Browser Software

Web Browser – Microsoft Internet Explorer 6.0 or later

Login Process

   - Then click on the Distributor services Link

   Or go directly to the logon web Site if you have saved it as one of your favorites.

   Enter you User ID and PIN. Note: If you do not have a User ID and password, you will need to contact the Heavy Oils Coordinator
   - Then Select the LOGIN button
1. Carrier Creation

You will need to select carriers to haul Asphalt and Liquid gas.

From the Drop down menu select the Customer Carriers. Then click the Continue button.

A new window will appear showing a list of your current carriers. To select a new Carrier click Add another Row.

A new row will appear. Click the Drop down button and Select the Carrier that you want. Note: if your carrier is not listed the carrier will need to contact the Heavy Oils Coordinator.

Select Read or Write.

- **Read** lets the carrier view their Release orders.
- **Write** lets the customer delegate authority to the carrier to Create a Release order.

Click the Submit Changes button to select the new carrier to your list.
• This will bring up a new window confirming changes.
• If you click on the Cancel order button to the right and click on the Submit changes button you will remove that specific carrier from your carrier list on the Release orders.

To close these windows just click on the X in the Right hand corner

2. Release order Creation

To create a Release order

From the main menu
- Click on the Drop down arrow and select the Release orders
- Then click the Continue button

This will bring up a new window with all available Sales orders
- Enter the # of loads
- Enter the Date the load will be picked up
- Click on the Create button

Note: The date entered is the date that the load will be picked up. The Release Order # is valid to use two days prior to that date and two days after that date. If the carrier tries to use the Release Order # outside of this window it will not work. The customer will need to create a new Release Order # for the carrier.

For Example: A Release Order is scheduled for 5/13/2004, A carrier can use that Release Order # from 5/11, 5/12, 5/13, 5/14 and 5/15 all day each day.
This will bring up a new window that has the Release Order # in it.

- Click the ‘drop down button and Select the Carrier from the carriers you have Previously Selected
- Enter any customer Ref#’s ie: PO #
- Click Submit changes

This will bring up a new window confirming changes
At this point the Release Order # is valid to use.

The Release # is required to enter the refinery and load selected product. Without a valid Release order # the carrier will be turned away.

To close these windows just click on the X in the Right hand corner

3. Release Order Review

To review release orders and status go back to the main screen

From the main menu

- Click on the Drop down menu select the Release orders
- Then click the Continue button

This will bring up a new window with all available Sales orders.

- From here you Click the drop down arrow
- Click on the type of report you would like to see
The Types of reports and edits are:
- Entered into the system – Orders that have an entered status, you may edit it from here
- Inside refinery – Release orders that have a carrier in the Refinery to pick up product
- Left refinery – Release orders that have been filled and left the refinery
- Scheduled for pickup – Release orders that are scheduled for a certain date
- Authorized to return Load – Return authorization
- Canceled – Release orders that have been canceled
- All – All Release orders, regardless of status

The first two statuses will pull up a list. You will **not** need to enter a date.
- The other status types you will need to enter a date. This is the from Status date to current
- Click on GO

This will bring up a list of entered Release orders.
- You may change the release order, by adding a carrier or customer Reference #.
- Or delete Release orders from here. When finished make sure to **Update**.

When selecting **all** you will see the following
4. Carrier Instructions

   - Then click on the Carrier services Link
   - Or go directly to the logon web Site if you have saved it as one of your favorites.
   - As a carrier enter you User ID and PIN.
   - Note: If you do not have a User ID and password, you will need to contact the Heavy Oils Coordinator.
   - Then Select the LOGIN button
Once you have logged on the following screen will appear.

- Click the drop down box; this should give you a list of customers that have Release orders set up for you.
- Select a customer

Options
You have two options to select from once you have selected a customer
1. Release Listings
2. Create Releases

1. If you select Release listing you must enter a from date and click on GO

This is an example of the report
2. Select Create Releases and then click on GO

The Following Screen will appear.

- Click on the drop down box, this will give you the following options

The Types of reports and edits are

- Entered – Release orders that have an entered status, you may edit it from here
- Checked In – Release orders that have a carrier in the Refinery to pick up product
- Checked out – Release orders that have been filled and left the refinery
- Return Auth – Return authorization
- Canceled – Release orders that have been canceled
- All – All Release orders, regardless of status

- Enter a date
- This is a from date
- Click on GO
This will bring up a list of Entered Release orders. You may change or delete Release orders from here. When finished make sure to **Submit changes**.

When selecting all you will see the following

The **Release #** is required to enter the refinery and load selected product. Without a valid Release order # the carrier will be turned away.

To close these windows just click on the X in the Right hand corner

### 5. Release Order Fall Back Procedure’s

**Customer**

Possible Problem - Customers Internet access is down or the customer does not have access to the Internet

The customer should call the Sinclair Customer Service at 1-800-916-3466