Consumption Sites

The Consumption Site screen is used to track Customers and their consumption sites, whether they have multiple sites and where these sites are. In the upper part of the screen are read-only fields. The information shown here are the same information shown in the Customer Inquiry screen.

Field Description

When the screen opens, it is defaulted to Site tab. This tab shows the Location, Site, Degree Day, and On Hold Information for a selected site.
This tab will show Delivery Details, Site Details, and other information like instructions and comments for a selected site.
This tab will show all devices attached to the consumption site, and information such as Device Type, Serial Number, Ownership, Manufacturer Name, Tank Capacity and Description are shown in its grid area. This will give you a preview of device's basic information and saves you an extra step from opening the Devices screen (see How to Open a Device record). See also How to Attach a Customer Owned device, How to Attach a Company Owned device, How to Detach or Remove a Device
This tab will show Customer Sites linked to a site. See also Associate Site
This tab will show all the appliances attached to a site. See also How to Add an Appliance, How to Delete an Appliance, Appliance Type
This tab will show Call Entry details of the selected site. If Call Entry toolbar button is shown with green plus (+) sign, then this tab will show all fields in a disabled mode. If Call Entry button is shown with red negative (-) sign, then this tab will show Call Entry information previously entered. See also Call Entry
This tab will show all delivery invoices for a selected site. If Billing By is Tank, the site will show the Delivery History tab. But if Billing By is Flow Meter, then the site will show the Meter History tab.

See also How to Open the Delivery History screen, How to Open the Delivery Detail screen, How to Open the Meter Reading History screen, Synchronize Delivery History
This tab will show all events created for the devices attached to a site and all events related to the selected site. See also Device Actions, Event History
The Work Orders tab lists down all work orders related to a site. See also Work Order

Work Order Details section:

Work Order No - This is a read-only field. Its value is system generated upon saving the new work order.

Status - This will default to Open on a new work order and Closed work order. Select the appropriate work order status from the combo box list.

Date Scheduled - Enter the date when the work order should be scheduled and completed.

Performer - This will default to the assigned Driver on Site tab. This field is used to enter the person who will perform the Work Order.

Additional Info - This field is optional. Enter any additional information you would like to include for the Work Order.

Entered By - This is a read-only and will automatically show the user who created the work order.

Date Created - This is a read-only field showing the system date the work order was created. This will default to the system date when creating a new work order.

Date Closed - This field is enabled only when the Status is set to Closed. Its default value is the system date when the work order was closed, but you can edit this if needed.

Close Reason - This field is enabled only when the Status is set to Closed. This is a required field. Select from the list of reasons.

Comments - This field is enabled only when the Status is set to Closed. Enter additional info regarding the closed work order.

To Do Items section - this grid area is disabled when Status is set to Closed.

Items - Select from the list of activities to be done to complete the work order. You can add, edit or delete an item in Work To Do Items

Completed - Manually check this to indicate that the Item is completed by the Performer.

Pages

- How to Open a Consumption Sites record
- How to Add a New Site
- How to Copy a Customer Bill Address to Site
- How to Deactivate a Site
- How to Attach a Customer Owned device
- How to Attach a Company Owned device
- How to Detach or Remove a Device
- How to Put a Delivery On Hold
- How to Put a Delivery Off Hold
- How to Reassign a Consumption Site
- How to Print an Efficiency report
- How to Manually Correct a Burn Rate
- Route
- Hold Reason
- Fill Method
- Fill Group
- Tank Township
- Meter Reading History
- Delivery History

- Delivery Detail
- Julian Calendar
    - How to Open the Julian Calendar screen
    - Julian Recurrence
        - How to Create a New Interval Recurring Calendar
        - How to Create a New Monthly Recurring Calendar
        - How to Create a New Single Recurring Calendar
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    - How to Edit a Julian Calendar
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- Associate Site
    - How to Open the Associate Site screen
    - How to Associate a Site
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- Contracts
- How to Add an Appliance
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- Call Entry
    - How to Create a Call Order
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    - Call Entry Parameters
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    - How to View Open Orders
        - How to Export Prices
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    - How Call Order Status is Updated
    - How to Print Delivery Tickets
    - How to Reassign a Driver
- How to Open the Delivery History screen
- How to Open the Delivery Detail screen
- How to Open the Meter Reading History screen
- Device Actions
    - How to Open the Device Action screen
    - How to Perform ‘At Customer to be Transferred Back to Bulk Plant Location’ Device Action
    - How to Perform ‘Pick up and Transfer Back to Bulk Plant Location’ Device Action
    - How to Perform ‘Cancel Pick up and Transfer Back to Bulk Plant Location’ Device Action
    - How to Perform ‘Transfer to Another Consumption Site’ Device Action
    - How to Perform ‘Enter Repair Notes’ Device Action
    - How to Perform ‘Sold’ device action
    - How to Perform ‘Bought’ device action
- Event History
    - How to Open an Event History record
    - How to Create a Consumption Sites Event
    - How to Create a Device Event
    - How to Delete an Event History record
- Work Order
    - How to Add a Work Order
    - How to Print a Work Order
    - How to Close a Work Order
    - How to Add the To Do Item to a Work Order
    - How to Delete a To Do Item of a Work Order
    - Work To Do Items
    - Close Reason
    - Work Status
    - Work Order Category
    - How to View Open Work Orders
- Summary List