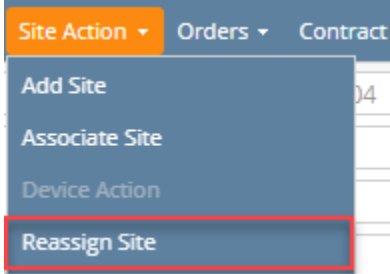


How to Reassign a Consumption Site

A consumption site can be reassigned from one customer to another. This is catered through **Reassign Site toolbar button** on Consumption Sites screen.

1. Open the [Consumption Sites record](#) that will be reassigned.
2. Click the **Site Action > Reassign Site toolbar button**.



- If the site has an open Call Entry, this message will prompt. Select **Yes** on the confirmation message – the 'reassign site' message will then prompt.



iRely i21

This site has an open call entry. Reassigning this site will delete the call entry.

Do you want to continue?



- If the site has no open Call Entry, this 'reassign site' confirmation message will prompt.



iRely i21

Are you sure you want to re-assign this Site?



3. Select **Yes** on the 'reassign site' confirmation message.

- If the attached device on the site has an existing Lease, the 'keep lease' message will prompt. The **Search Customer** screen will be opened when you select either **Yes** or **No**.



iRely i21

The system found device(s) has lease.
Do you want to transfer the lease to the new customer?
If you click YES, the customer will become the lease's Bill Customer. If you click NO, the lease will be deleted during the process. If you click CANCEL, the process will not continue.

Yes

No

Cancel

- If the attached device on the site has no existing Lease, then it will open the Search Customer screen.

Customer No	First Name	Last Name	Phone
<input type="checkbox"/> 0001005080		Customer C	3000000000
<input type="checkbox"/> 0001005079		Customer B	2000000000
<input type="checkbox"/> 0001005078		Customer A	1000000000

4. Search for the new customer, select it, and then click the **Open Selected** toolbar button. This confirmation message will be displayed.



iRely i21

Site has been reassigned successfully. Do you want to load the new site record?

Yes

No

5. Once you are prompted to open the new site record, select **Yes** if you want to. However, if you want to remain in the current site record then select **No** button.

The old site is deactivated after the process. Only the device level events of the old site will be copied over and displayed on the Event History tab of the new site. The **Consumption Site Reassigned** and **Consumption Site Activated** events are auto-generated for the new site.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (0)
Q Open	X Remove	Layout	Q	Filter Records (F3)						
Date	Type	Description ▼				User ID	Serial No.			
04/27/2016	Consumption Site Reassigned	Consumption Site Reassigned				irelyadmin				
04/27/2016	Consumption Site Activated	Consumption Site Activated				irelyadmin				

While, **Consumption Site Reassigned** and **Consumption Site Deactivated** events are generated for the old site.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (17)
Q Open	X Remove	Layout	Q	Filter Records (F3)						
Date	Type	Description ▼				User ID	Serial No.			
04/27/2016	Consumption Site Reassigned	Consumption Site Reassigned				irelyadmin				
04/27/2016	Consumption Site Deactivated	Consumption Site Deactivated				irelyadmin				

A consumption site can be reassigned from one customer to another. This is catered through **Reassign Site toolbar button** on Consumption Sites screen.

1. Open the **Consumption Sites record** that will be reassigned.
2. Click the **Site Action > Reassign Site toolbar button**.

Consumption Sites - 0001005078

New Save Search Undo Attach Device **Site Action** Print Call Entry Add Call Entry Dispatch Contract

Customer: Customer A 0005078
Address: 1234 Main St.
Fort Wayne, IN 46801
Phone: Credit Limit: 0.00

Associate Site
Device Action
Reassign Site

- If the site has an open Call Entry, this message will prompt. Select **Yes** on the confirmation message – the 'reassign site' message will then prompt.



iRely i21

This site has an open call entry. Reassigning this site will delete the call entry.
Do you want to continue?

Yes

No

- If the site has no open Call Entry, this 'reassign site' confirmation message will prompt.



iRely i21

Are you sure you want to re-assign this Site?

Yes

No

3. Select **Yes** on the 'reassign site' confirmation message.

- If the attached device on the site has an existing Lease, the 'keep lease' message will prompt. The **Search Customer** screen will be opened when you select either **Yes** or **No**.



iRely i21

The system found device(s) has lease.

Do you want to transfer the lease to the new customer?

If you click YES, the customer will become the lease's Bill Customer. If you click NO, the lease will be deleted during the process. If you click CANCEL, the process will not continue.

Yes

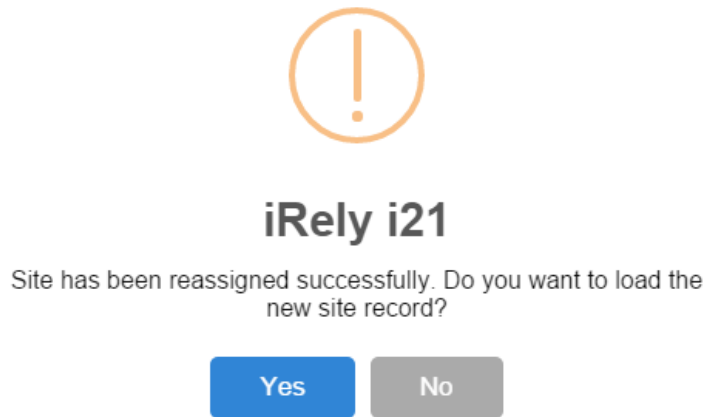
No

Cancel

- If the attached device on the site has no existing Lease, then it will open the Search Customer screen.

Search Customer				
Open Selected Refresh Export Close				
Filter Records (F3)		3 records		
	Customer No	First Name	Last Name	Phone
<input type="checkbox"/>	0001005080		Customer C	3000000000
<input type="checkbox"/>	0001005079		Customer B	2000000000
<input type="checkbox"/>	0001005078		Customer A	1000000000
<input type="checkbox"/>				

4. Search for the new customer, select it, and then click the **Open Selected toolbar button**. This confirmation message will be displayed.



5. Once you are prompted to open the new site record, select **Yes** if you want to. However, if you want to remain in the current site record then select **No button**.

The old site is deactivated after the process. Only the device level events of the old site will be copied over and displayed on the Event History tab of the new site. The **Consumption Site Reassigned** and **Consumption Site Activated** events are auto-generated for the new site.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (0)
Q Open X Remove Layout Q Filter Records (F3)										
Date	Type	Description	User ID	Serial No.						
04/27/2016	Consumption Site Reassigned	Consumption Site Reassigned	irelyadmin							
04/27/2016	Consumption Site Activated	Consumption Site Activated	irelyadmin							

While, **Consumption Site Reassigned** and **Consumption Site Deactivated** events are generated for the old site.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	Attachment (0)	Audit Log (17)
Q Open X Remove Layout Q Filter Records (F3)										
Date	Type	Description	User ID	Serial No.						
04/27/2016	Consumption Site Reassigned	Consumption Site Reassigned	irelyadmin							
04/27/2016	Consumption Site Deactivated	Consumption Site Deactivated	irelyadmin							

A consumption site can be reassigned from one customer to another. This is catered through **Reassign Site toolbar button** on Consumption Sites screen.

1. Open the [Consumption Sites record](#) that will be reassigned.
2. Click the **Site Action > Reassign Site toolbar button**.

Consumption Sites - 0001005078

NewSaveSearchUndoAttach Device ▾Site Action ▾Print Call EntryAdd Call EntryDispatch

Customer:Customer A

Address:1234 Main St.
Fort Wayne, IN 46801

Phone:1000000000

Associate Site

Device Action

Delivery

Reassign Site

78

ceipt

0.00

0.00

- If the site has an open Call Entry, this message will prompt. Select **Yes** on the confirmation message – the 'reassign site' message will then prompt.



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This site has an open call entry. Reassigning this site will delete the call entry.
Do you want to continue?

Yes

No

- If the site has no open Call Entry, this 'reassign site' confirmation message will prompt.



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Are you sure you want to re-assign this Site?

Yes

No

3. Select **Yes** on the 'reassign site' confirmation message.

- If the attached device on the site has an existing Lease, the 'keep lease' message will prompt. The **Search Customer** screen will be opened when you select either **Yes** or **No**.



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The system found device(s) has lease.
Do you want to transfer the lease to the new customer?
If you click YES, the customer will become the lease's Bill Customer. If you click NO, the lease will be deleted during the process. If you click CANCEL, the process will not continue.

Yes

No

Cancel

- If the attached device on the site has no existing Lease, then it will open the Search Customer screen.

Search Customer				
Open Selected Refresh Export Close				
Filter Records (F3) 3 records				
	Customer No	First Name	Last Name	Phone
<input type="checkbox"/>	0001005080		Customer C	3000000000
<input type="checkbox"/>	0001005079		Customer B	2000000000
<input type="checkbox"/>	0001005078		Customer A	1000000000

4. Search for the new customer, select it, and then click the **Open Selected toolbar button**. This confirmation message will be displayed.



iRely i21

Site has been reassigned successfully. Do you want to load the new site record?

Yes

No

5. Once you are prompted to open the new site record, select **Yes** if you want to. However, if you want to remain in the current site record then select **No** button.

The old site is deactivated after the process. Only the device level events of the old site will be copied over and displayed on the Event History tab of the new site. The **Consumption Site Reassigned** and **Consumption Site Activated** events are auto-generated for the new site.

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders Attachment (0) Audit Log (0)				
Open Remove Layout Filter Records (F3)				
Date	Type	Description	User ID	Serial No.
04/27/2016	Consumption Site Reassigned	Consumption Site Reassigned	irelyadmin	
04/27/2016	Consumption Site Activated	Consumption Site Activated	irelyadmin	

While, **Consumption Site Reassigned** and **Consumption Site Deactivated** events are generated for the old site.

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders Attachment (0) Audit Log (17)				
Open Remove Layout Filter Records (F3)				
Date	Type	Description	User ID	Serial No.
04/27/2016	Consumption Site Reassigned	Consumption Site Reassigned	irelyadmin	
04/27/2016	Consumption Site Deactivated	Consumption Site Deactivated	irelyadmin	

A consumption site can be reassigned from one customer to another. This is catered through **Reassign Site toolbar button** on Consumption Sites screen.

1. Open the [Consumption Sites record](#) that will be reassigned.
2. Click the **Site Action > Reassign Site toolbar button**.

Consumption Sites - 0001005078				
New	Save	Search	Undo	Attach Device
Site Action Print Call Entry + Call Entry Dispatch				
Customer:	Customer A			
Address:	1234 Main St. Fort Wayne, IN 46801			
Phone:	1000000000			

Associate Site
 Device Action
 Delivery
Reassign Site

- If the site has an open Call Entry, this message will prompt. Select **Yes** on the confirmation message – the 'reassign site' message will then prompt.



iRely i21

This site has an open call entry. Reassigning this site will delete the call entry.
Do you want to continue?

Yes

No

- If the site has no open Call Entry, this 'reassign site' confirmation message will prompt.



iRely i21

Are you sure you want to re-assign this Site?

Yes

No

3. Select **Yes** on the 'reassign site' confirmation message.

- If the attached device on the site has an existing Lease, the 'keep lease' message will prompt. The **Search Customer** screen will be opened when you select either **Yes** or **No**.



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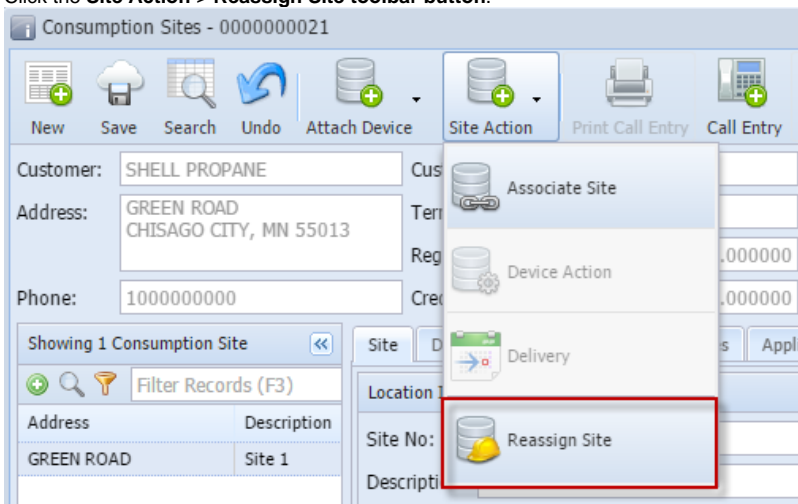
The system found device(s) has lease.
Do you want to transfer the lease to the new customer?
If you click YES, the customer will become the lease's Bill Customer. If you click NO, the lease will be deleted during the process. If you click CANCEL, the process will not continue.

Yes

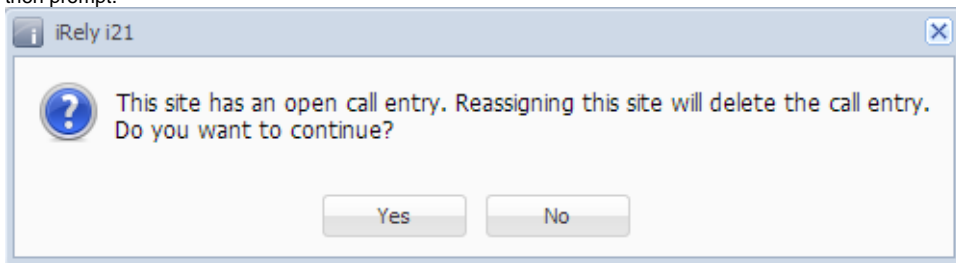
No

Cancel

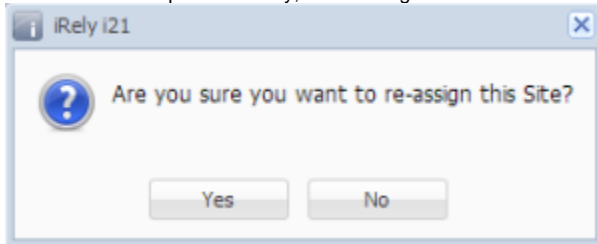
- Click the **Site Action > Reassign Site** toolbar button.



- If the site has an open Call Entry, this message will prompt. Select **Yes** on the confirmation message – the 'reassign site' message will then prompt.

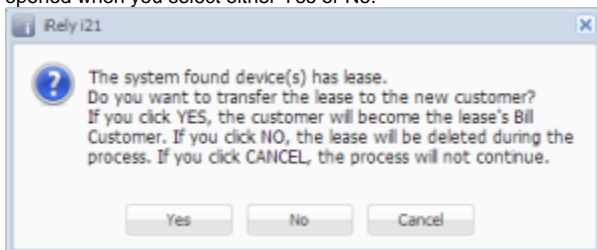


- If the site has no open Call Entry, this 'reassign site' confirmation message will prompt.

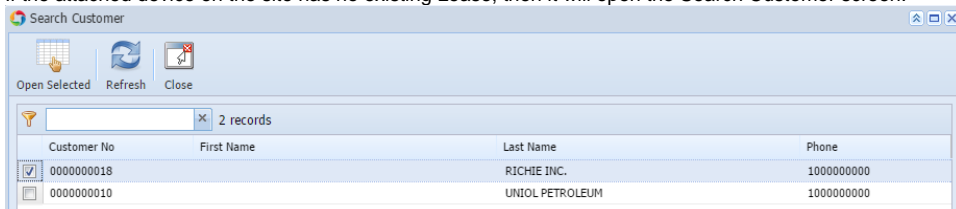


- Select **Yes** on the 'reassign site' confirmation message.

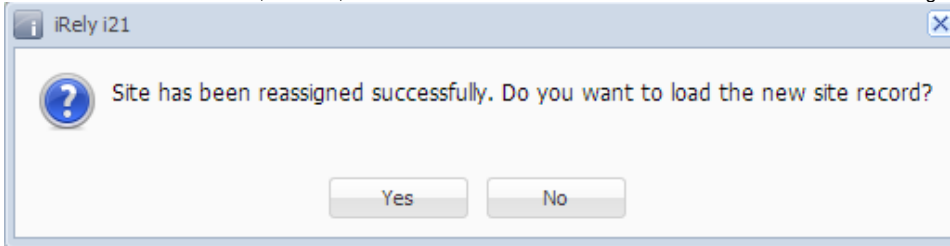
- If the attached device on the site has an existing Lease, the 'keep lease' message will prompt. The Search Customer screen will be opened when you select either Yes or No.



- If the attached device on the site has no existing Lease, then it will open the Search Customer screen.



- Search for the new customer, select it, and then click the **View toolbar button**. This confirmation message will be displayed.



- Once you are prompted to open the new site record, select **Yes** if you want to. However, if you want to remain in the current site record then select **No button**.
The old site is deactivated after the process. Only the device level events of the old site will be copied over and displayed on the Event History tab of the new site. The **Event-001** and **Event-005** is auto-generated for the new site.

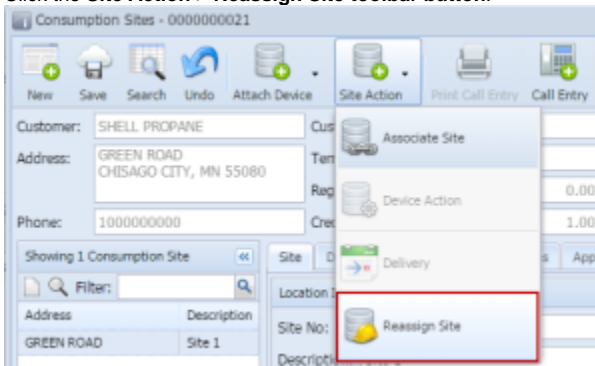
Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Remove Layout Filter Records (F3)								
Date	Type	Description	User ID	Serial No.				
06/15/2015	Event-005	Consumption Site Reassigned	AGADMIN					
06/15/2015	Event-001	Consumption Site Activated	AGADMIN					

While, **Event-002** and **Event-005** is generated for the old site.

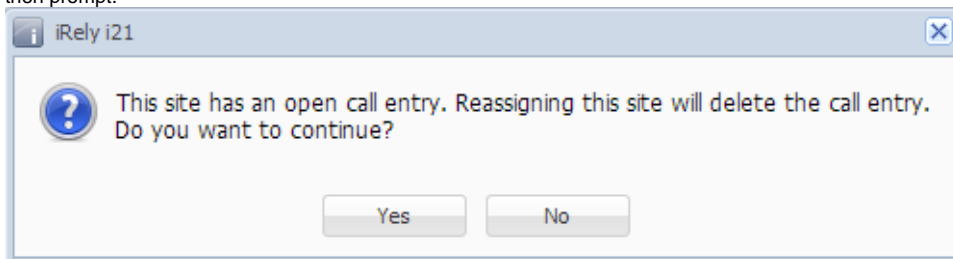
Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Remove Layout Filter Records (F3)								
Date	Type	Description	User ID	Serial No.				
06/15/2015	Event-005	Consumption Site Reassigned	AGADMIN					
06/15/2015	Event-002	Consumption Site Deactivated	AGADMIN					

A consumption site can be reassigned from one customer to another. This is catered through **Reassign Site toolbar button** on Consumption Sites screen.

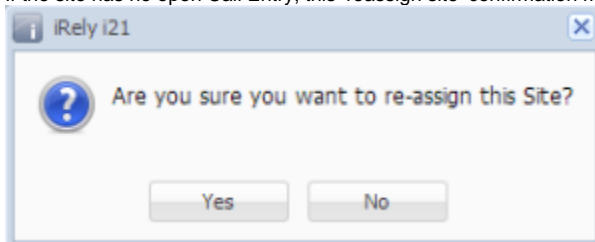
- Open the **Consumption Sites** record that will be reassigned.
- Click the **Site Action > Reassign Site toolbar button**.



- If the site has an open Call Entry, this message will prompt. Select **Yes** on the confirmation message – the 'reassign site' message will then prompt.

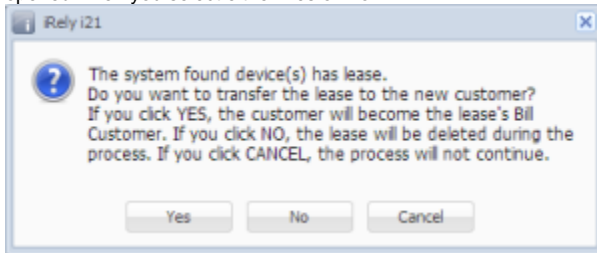


- If the site has no open Call Entry, this 'reassign site' confirmation message will prompt.

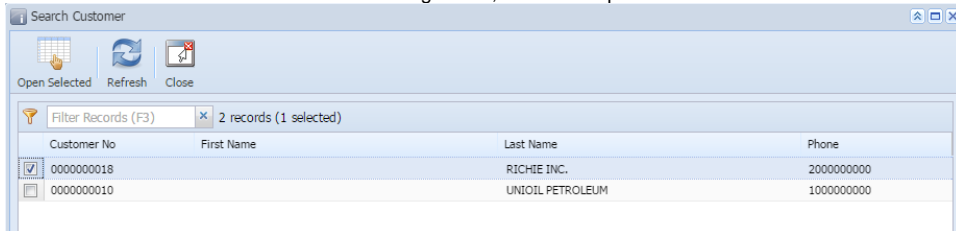


- Select **Yes** on the 'reassign site' confirmation message.

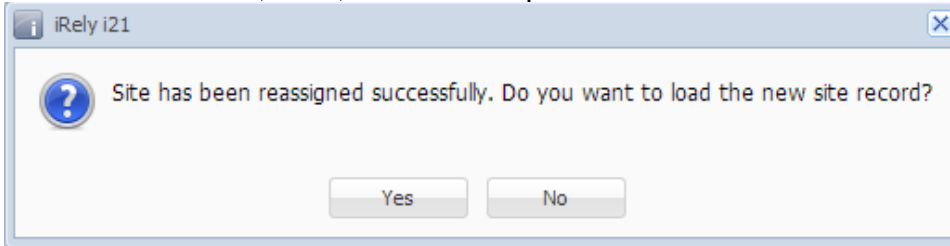
- If the attached device on the site has an existing Lease, the 'keep lease' message will prompt. The Search Customer screen will be opened when you select either Yes or No.



- If the attached device on the site has no existing Lease, then it will open the Search Customer screen.



4. Search for the new customer, select it, and then click the **Open Selected toolbar button**. This confirmation message will be displayed.



5. Once you are prompted to open the new site record, select **Yes** if you want to. However, if you want to remain in the current site record then select **No button**.

The old site is deactivated after the process. Only the device level events of the old site will be copied over and displayed on the Event History tab of the new site. The **Event-001** and **Event-005** is auto-generated for the new site.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Delete Filter: [Search]								
Date	Type	Description	User ID	Serial No.				
06/06/2014	Event-005	Consumption Site Reassigned	AGADMIN					
06/06/2014	Event-001	Consumption Site Activated	AGADMIN					

While, **Event-002** and **Event-005** is generated for the old site.

Site	Detail	Devices	Associated Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders
View Delete Filter: [Search]								
Date	Type	Description	User ID	Serial No.				
06/06/2014	Event-005	Consumption Site Reassigned	AGADMIN					
06/06/2014	Event-002	Consumption Site Deactivated	AGADMIN					