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.



If the site has an open Call Entry, this message will prompt. Select Yes on the confirmation message - the 'reassign site' message will ٠ 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.



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.



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

	earch Customer					^			
	Open Selected Ref	fresh Export - C	lose						
ľ	Q Filter Records (F3) 3 records								
	Customer No	First Na	me	Last Name	Phone				
	0001005080			Customer C	300000000	*			
	0001005079			Customer B	200000000				
	0001005078			Customer A	100000000				

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, 0	Q. Open X. Remove III Layout Q. Filter Records (F3)										
Date Type			Descripti	Description 🔻				ser ID	Serial No.		
04/27/2016 Consumption Site Reassigned			Consum	Consumption Site Reassigned				irelyadmin			
04/27/2016 Consumption Site Activated			Consum	Consumption Site Activated				irelyadmin			

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

Q_k Open X Remove BB Layout Q_k Filter Records (F3) Date Type Description ▼ User ID Serial No.								
Date Type Description * User ID Serial No.	Q Open X Remove 🔡 Layout 🔍 Filter Records (F3)							
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.

Open the Co Click the Sit Consumpti	n the Consumption Sites record that will be reassigned. (the Site Action > Reassign Site toolbar button. hsumption Sites - 0001005078									
New Save	e Search Une	do	Attach Device	Site Action	Print Call Entry	A	dd Call Entry		с	
Customer:	Customer A 1234 Main St. Fort Wayne, IN 46801		Associate Site Device Action		005078					
Address:										
			Reassign Sit	e						
Phone:				Cr	edit Limit:					

• 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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0.00

0.00



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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.



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**.



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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.



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

Sea	rch Customer			~ [×
Op	een Selected Refresh Exp	ort - Close			
٩	Filter Records (F3)	3 records			
	Customer No	First Name	Last Name	Phone	
	0001005080		Customer C	300000000	•
	0001005079		Customer B	200000000	10
	0001005078		Customer A	100000000	10
					10

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



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



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 III Layout Q Filter Records (F3)										
Date	Туре	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, 0	Q. Open X. Remove 器 Layout Q. Filter Records (F3)										
Date Type			Description *	Description 🔻				er ID	Serial No.		
04/27/2016 Consumption Site Reassigned			Consumption	Consumption Site Reassigned			ire	irelyadmin			
04/27/2016 Consumption Site Deactivated			Consumption Site Deactivated			ire	lyadmin				

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	e Search Undo Attach Device -	Site Action - Print Call Entry	Add Call Entry Dispatch							
Customer:	Customer A	Associate Site	78							
Address:	1234 Main St. Fort Wayne, IN 46801	Device Action	ceipt							
	Fore mayne, in 40001	Delivery	0.00							
Phone:	100000000	Reassign Site	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?



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



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.



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

Sea	rch Customer			^ □ ×						
Ор	en Selected Refresh Exp	ort - Close								
٩	Q Filter Records (F3) 3 records									
	Customer No	First Name	Last Name	Phone						
	0001005080		Customer C	300000000						
	0001005079		Customer B	200000000						
	0001005078		Customer A	100000000						

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



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



Appliances Call Entry

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.

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Q. Open X. Remove III Layout Q. Filter Records (F3)									
Date	Туре	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 Detai	Associated sites	e ⊞ Layout Q Filter Records (F3) Description ▼ User ID Serial No. ption Site Reassigned Consumption Site Reassigned irelyadmin		
Q, Open	🗙 Remove 🔠 Layout 🛛 🔍	Filter Records (F3)		
Date	Туре	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	

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1. Open the Consumption Sites record that will be reassigned.

Ani

2. Click the Site Action > Reassign Site toolbar button.

Sita Datail Devices As

Consumpti	on Sites - 0001005078			
New Save	e Search Undo Attach Device -	Site Action +	+ Call Entry	
Customer:	Customer A	Associate Site	8	
Address:	1234 Main St. Fort Wayne, IN 46801	L. Device Action eipt		
	Tore wayne, in 40001	Delivery		intry Dispatch
Phone:	100000000	Reassign Site		Dispatch

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

Se	arch Customer			^ □ ×
(pen Selected Refresh Exp	ort + Close		
	Filter Records (F3)	3 records		
	Customer No	First Name	Last Name	Phone
	0001005080		Customer C	300000000
1	0001005079		Customer B	200000000
	0001005078		Customer A	100000000
L				

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



Yes

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 Deta	III Devices Associated Sites	Appliances Call Entry Delivery History Event History	Work Orders Audit Log (1)
	Q, Open	X Remove 🔠 Layout 🔍	Filter Records (F3)	-
	Date	Туре	Description	User ID Serial No.
	01/28/2016	Consumption Site Reassigned	Consumption Site Reassigned	irelyadmin
	01/28/2016	Consumption Site Activated	Consumption Site Activated	irelyadmin
Ľ	S			

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	Audit Log (17)	
Q, Open	× Remove	맘 Layout 🛛 🔍	Filter Record	ls (F3)					
Date Type Description User ID Serial No.				Serial No.					
01/28/2016	01/28/2016 Consumption Site Reassigned			n Site Reassi	gned		irelya	dmin	
01/28/2016 Consumption Site Deactivated			Consumptio	in Site Deacti	vated		irelya	dmin	

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 - 000000021									
			-			S	Q	P		
try	Call Ent	Print Call Entry	Site Action	vice	Attach Devi	Undo	Search	Save	New	
		aha Cika		Cus		PANE	ELL PROP	r: SH	Custome	
		ate site	Associ	Ter		GR	Address:			
000	.0000			Red	55013	IY, MN	ISAGO CI	CH		
		Action	Device	_						
000	.0000			Cre		0	0000000	10	Phone:	
Appli	s I	ry	Delive	ite D	K Site	ite	umption S	1 Cons	Showing	
				ocation 1	Loc	rds (F3)	lter Reco	ү Fi	O Q	
	-	ian Site	Paseri	te No:	otion	Descri			Address	
		gii site	Seassi	ite NO.	510	Site 1		ROAD	GREEN F	
				escripti	Des					
	.0000 .0000 s	: Action ry ign Site	Device	Reg Cre ite D ocation i ite No: escripti	Site Site Des	0 ite rds (F3) Descrij Site 1	umption S	10 1 Cons 7 F	Phone: Showing O Q Address GREEN F	

 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 the Do you want to continue?	is site will delete the call entry.
Yes No	
If the site has no open Call Entry, this 'reassign site' confirmation m	essage will prompt.
👔 iRely i21 🗙	
Are you sure you want to re-assign this Site?	

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

Yes

 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.



No

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

() s	Search Customer			2 🗆 🖄
Ope	en Selected Refresh	Close		
8		× 2 records		
	Customer No	First Name	Last Name	Phone
	000000018		RICHIE INC.	100000000
E	000000010		UNIOL PETROLEUM	100000000

4. Search for the new customer, select it, and then click the View 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	Associat	ted Sites	Appliances	Call Entry	Delivery History	Event History	Work Orders	
🔍 Viev	N 😑	Remove	Layout 🗸	💡 Filt	er Records (F	3)		-	-	
Date	ate Type Description User ID Serial No.									
06/15/2	015	Event-005		Consump	tion Site Reass	igned		1	AGADMIN	
06/15/2	015	Event-001		Consump	tion Site Activa	ited		4	AGADMIN	
· · · · · ·										

١	Nhile, Eve ı	/hile, Event-002 and Event-005 is generated for the old site.										
	Site Detail	Devices Associat	ted Sites Appliances Call Entry	Delivery History	Event History	Work Orders						
	Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders View Remove H Layout + Filter Records (F3) Date Type Description User ID Serial No. D6/15/2015 Event-005 Consumption Site Reassigned AGADMIN											
	Date	Туре	Description		Use	r ID	Serial No.					
	06/15/2015	Event-005	Consumption Site Reassigned		AG	ADMIN						
I	06/15/2015	Event 002	Consumption Site Departicuted		10	DATA						

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 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.



Search Customer			A D X
Open Selected Refresh	Close		
Filter Records (F3)	× 2 records (1 selected)		
Customer No	First Name	Last Name	Phone
000000018		RICHIE INC.	200000000
000000010		UNIOIL PETROLEUM	100000000

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

Rely	121						×
?	Site has be	en reassign	ed succes	sfully. Do you v	vant to load th	e new site re	cord?
			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 **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:												
Date	Date Type		Descrip	Description					Serial No.			
06/06/2014 Event-005		Consu	Consumption Site Reassigned									
06/06/2014 Event-001		Consu	Consumption Site Activated									

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				
Tiew ODelete Filter:											
Date Type		Descript	Description					Serial No.			
06/06/2014	Event-005	Consum	Consumption Site Reassigned								
06/06/2014 Event-002 Consumption Site Deacti				tivated		A	GADMIN				