



# JOB AID: FA LOCATIONS

## TASK NAME: FA LOCATION REQUEST PROCESS

<b>Process Name:</b>	<b>FA Location Creation, Modification</b>
<b>Project Name:</b>	Vendor Held Equipment Project
<b>Document Type:</b>	Job Aid
<b>Owners:</b>	Tanya Ross, Don Willis

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### 1. OVERVIEW

**Task Description:** Request new FA Location, or edit existing FA Location

**Key Input/Trigger:** Need for new FA Location, or incorrect existing info

**Task Output:** New FA Location created, or existing FA Location edited

**Reports:** Pull a report of ALL FA Locations by Vendor or Sub-Contractor

### 2. ASSUMPTIONS

- **COMPATIBILITY ISSUE:** We are having issues sending notification emails and exporting documents when using Internet Explorer. We are aware of the issue and working to correct it. For the time being, please use Firefox or Chrome.
- The Vendor can access the systems and forms and has been trained to use the systems & forms mentioned in the “Required System Access” tables.



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#### 3. SEARCH FOR AN EXISTING FA LOCATION

1. From the Home Page, you can search for an existing FA Location, using filters for the following fields
  - a. Location Code
  - b. Zip Code
  - c. Address
  - d. State(s) – With the ability to search multiple states
  - e. Vendor
  - f. Subcontractor
2. Once you have entered all of the pertinent information, click “Search”
3. The search results will appear the bottom of the page.
  - a. To export this list to Excel, click “Export” in the top right corner
  - b. To get expanded details about a specific FA Location, click on the Location Code in the leftmost column
  - c. To modify a specific FA Location, click on “Edit” in the rightmost column

#### 4. EDIT AN EXISTING FA LOCATION

1. Follow the steps in section 3 (Search for an Existing FA Location)
2. Once you have found the FA Location to edit, click on “Edit” in the rightmost column
3. You can now edit the following fields:
  - a. Site Status
    - i. Select “Off” to deactivate the FA Location
  - b. Address Line 2
  - c. Contact Name
  - d. Contact Email
  - e. Contact Phone Number
4. Enter your contact information in the Requestor fields
  - a. Your name should already be populated as the Requester Name
  - b. Enter your email as the Requestor Email
  - c. Enter your phone number as the Requestor Phone Number



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- i. Do not include any special characters or dashes



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5. When you have completed editing the FA Location, and all required fields are completed, click "Submit"

#### 5. ACTIVATE OR DEACTIVATE A FA LOCATION

1. Follow the steps in section 3 (Search for an Existing FA Location)
2. Once you have found the FA Location to activate/deactivate, click "Edit" in the rightmost column
3. Site Status
  - a. To deactivate a FA Location, turn the Site Status switch to "OFF"
  - b. To activate a FA Location, turn the Site Status switch to "ON"

#### 6. CREATE AN FA LOCATION

1. At the bottom of the Home Page, click on the link "click here to add a new location"
2. Complete the form, filling out the required fields:
  - a. If the FA Location you are created is REPLACING a current FA Location, select "Yes"
  - b. Select the Primary Turf Vendor
    - i. If the Primary Turf Vendor is not included on the list, select "Other" and enter the Vendor Name
  - c. Select the Subcontractor
    - i. If there is no subcontractor, select "None"
    - ii. If the Subcontractor is not included on the list, select "Other" and enter the Subcontractor Name
  - d. Enter the Address of the FA Location
    - i. **DO NOT ABBREVIATE STREET SUFFIXES**
  - e. If applicable, enter the Address Line 2 of the FA Location (Suite, Room #, etc.)
  - f. Enter the Zip Code
  - g. Enter a contact name
  - h. Enter a contact email
  - i. Enter a contact phone number

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- i. Do not include any special characters or dashes
3. Enter your contact information in the Requestor fields
  - a. Your name should already be populated as the Requester Name
  - b. Enter your email as the Requestor Email
  - c. Enter your phone number as the Requestor Phone Number
    - i. Do not include any special characters or dashes
4. Once you have completed all required fields, click “Submit”

#### 7. Reports

1. Enter your Search Criteria (Not all fields are mandatory, select as least one)
  - a. Location Code
  - b. Zip
  - c. Address
  - d. State/States
  - e. Vendor
  - f. Subcontractor
2. Once you have completed all desired fields, click “Submit”
3. From the Results screen, click “Export”

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### 8. REQUIRED SYSTEM ACCESS

System Name	Hyperlink
FA Request Process	<a href="https://ebiznet.sbc.com/sbcnebs/FA_RequestProcess/default.cfm">https://ebiznet.sbc.com/sbcnebs/FA_RequestProcess/default.cfm</a>

### 9. TERMS AND ACRONYMS

Term	Acronym	Description
Fixed Assets Location	FA Location	Specifies the actual location of fixed assets. The fixed asset location could be a warehouse, a precise location within a warehouse, a company department or another premises within the company.

### 10. JOB AID REVISION HISTORY

Revision	Revision Summary	Release Date	QuickBase #	Edited By
1.0	Creation	8.31.2016	1	Tyler Morrison
2.0	Compatibility Note	9.16.2016	2	Tyler Morrison
3.0	Reports, Search by Subcontrator, Search by multiple states, 1 contact per request	8.14.2017	3	Tanya Ross